

## PERSONAL CLIENT INFO SHEET & CONTACT DETAILS

### Client Information

Mr/Mrs/Miss/Ms/Other \_\_\_\_\_

Preferred Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ SIN \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Home Phone \_\_\_\_\_ Cellphone \_\_\_\_\_

Email \_\_\_\_\_

Would you like to receive our quarterly Newsletter via email? Yes No

How did you hear about us? \_\_\_\_\_

Canadian Citizen: Yes No Provide information to Elections Canada: Yes No

Own Foreign Property: Yes No Sold a home: Yes No

### Spouse/Partner Information

Mr/Mrs/Miss/Ms/Other \_\_\_\_\_

Preferred Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ SIN \_\_\_\_\_

Home Phone \_\_\_\_\_ Cellphone \_\_\_\_\_

Email \_\_\_\_\_

Would you like to receive our quarterly Newsletter via email? Yes No

Canadian Citizen: Yes No Provide information to Elections Canada: Yes No

Own Foreign Property: Yes No

### Marital Status

- Married       Common-law       Separated  
 Single       Divorced       Widowed

### Dependants

Name \_\_\_\_\_ Gender: \_\_\_\_\_

Date of Birth \_\_\_\_\_ SIN \_\_\_\_\_

Name \_\_\_\_\_ Gender: \_\_\_\_\_

Date of Birth \_\_\_\_\_ SIN \_\_\_\_\_

Name \_\_\_\_\_ Gender: \_\_\_\_\_

Date of Birth \_\_\_\_\_ SIN \_\_\_\_\_

Name \_\_\_\_\_ Gender: \_\_\_\_\_

Date of Birth \_\_\_\_\_ SIN \_\_\_\_\_