

PERSONAL CLIENT INFO SHEET & CONTACT DETAILS

Documents to be signed via TaxFolder (portal) Email Hard Copy

Client Information

Mr./Mrs./Miss/Ms./Other _____ SIN _____
 Preferred Name _____ Date of Birth MM/DD/YYYY _____
 Address _____ City _____
 Province _____ Postal Code _____ Home # _____
 Cell # _____ Email Address _____

Are you a Canadian Citizen Yes No Do you own foreign property Yes No

Do you want CRA to provide information to Elections Canada Yes No

Have you sold a home in the tax year we're working on? Yes No

Spouse/Partner Information

Mr./Mrs./Miss/Ms./Other _____ SIN _____
 Preferred Name _____ Date of Birth MM/DD/YYYY _____
 Cell # _____ Email Address _____

Marital Status

Married Common-Law Separated Single Divorced Widowed

Dependants

Name	Date of Birth mm/dd/yyyy	SIN	Gender M/F/O

Other

Would you to be added to our newsletter mailing list? Yes No

How did you hear about us? _____