

Client Information Sheet

Company Name

Business #

Marital Status

Name

Personal

Spouse

Sole proprietorship

Contact Number

Corporation

E-Mail

Farm

Address

Rental

Did you sell your home in 2022

Did you move in 2022

Foreign assets over cad

\$100,000 (no personal use)

D.O.B.

S.I.N#

D.O.B.

S.I.N#

Dependant Name(S) & D.O.B.

1.

D.O.B.

S.I.N#

2.

D.O.B.

S.I.N#

3.

D.O.B.

S.I.N#

4.

D.O.B.

S.I.N#

Special Note

Initial When Completed

Prepared By

Finalized/Invoiced