

General Information Sheet

Each person needs to complete and sign one of these pages

Please make sure all of the questions have been answered.

A. BASIC INFORMATION

Cell phone _____ Fax _____

E-mail address _____ Work phone _____
(very helpful for sending you questions) (if you want us to call you there)

Did your address change in 2023? **YES** **NO**

Did your marital status change in 2023? **YES** **NO**

If yes, please provide new status _____ date of change _____

Are you a United States citizen or hold a green card from the US? **YES** **NO**

Are you a citizen of a country other than Canada or the U.S.A **YES** **NO**

If yes, please provide details _____

B. SALE OF PRINCIPAL RESIDENCE

Did you sell a principal residence at any time during 2023? **YES** **NO**

If yes, please provide year of acquisition _____

Proceeds of disposition _____

Description of property (address) _____

C. FOREIGN PROPERTY (investments, real estate, bank accounts in foreign country)

Did you own foreign property at any time in 2023 with a total cost of more than CAN \$100,000? **YES** **NO**

Did you confirm this information with your investment advisor? **YES** **NO**

Special forms must be filed if you owned foreign property that had a cost of more than \$100,000 at any time during the year. The penalties for not filing this information are very high (\$100 a day to a maximum of \$2,500).

I confirm that all the above information is correct and contains all the information requested in regard to these particular matters.

Signature

Name (print)

Date