

General Information Sheet

Complete one form per family

A. Name: _____ Spouse name: _____

Email: _____ Spouse email: _____

(We are integrating a new portal system. We require the email for each individual that we are completing a tax return for) – disregard if the individual does not have an email address.

Work phone: _____

B. Did your address change in 2024? **YES** **NO**

If yes, what is your new address: _____

C. Did your marital status change in 2024? **YES** **NO**

If yes, date of change _____ New status(single/married) _____

D. Are you a United States citizen or hold a green card from the U.S.A? **YES** **NO**

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

If yes, please provide details _____

E. SALE OF PRINCIPAL RESIDENCE

Did you sell a principal residence at any time during 2024? **YES** **NO**

If yes, please provide original year of purchase _____

Sale Price _____ property (address) _____

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

Did anyone in your household own foreign property at any time in 2024 with a total cost of more than CAN \$100,000? **YES** **NO**

Did you confirm this with your investment advisor?(if applicable) **YES** **NO** **N/A**

G. Does anyone live with you or do you support anyone other than your children (elderly parents or other relatives)? Please indicate their name and how you are related.

Name: _____ Relation: _____

