

Complete this form and return with your tax slips and receipts

1. **If any of your personal information has changed from last year,** complete the section below:

Name:
Address:
Telephone:
Email Address:

2. Beneficiary information:

Name	Date of Birth (dd/mm/yy)	SIN	Address

3. Any new beneficiaries? Yes/No

4. Any births of potential beneficiaries? Yes/No

5. Any deaths of existing beneficiaries? Yes/No

6. Please provide copies of the following, if applicable:

- Balance Sheet
- Profit and Loss Report
- General Ledger Report
- Tax Slips
- Bank Statements
- Investment Statements
- Capital Gains Report

7. Did you pay any tax by instalments? Yes/No If yes, how much \$ _____

8. Do you hold investments or mutual funds in a non-registered investment account? Yes/No

- If yes, please provide annual statements and trading summaries

9. Do you hold investments or property in a foreign account exceeding that amount of \$100,000?
Yes/No

- If yes, please provide annual statements

10. Did you incur any management or professional fees? Yes/No

- If yes, please provide annual statements and invoices

11. Did you make any distributions this year? If yes, please complete the table below.

To whom	Date	Amount Paid	SIN