

Name \_\_\_\_\_

Home Address \_\_\_\_\_

Email Address(es) \_\_\_\_\_

Marital Status \_\_\_\_\_

Dependent Children \_\_\_\_\_

1 Did you move in 2024?  Yes  No

*If yes, please explain.*

\_\_\_\_\_

2 Did your marital status change in 2024?  Yes  No

*If yes, please explain (type of change, date of change)*

\_\_\_\_\_

3 Was there any change to your dependents in 2024?  Yes  No

*If yes, please explain.*

\_\_\_\_\_

4 Did you sell any property in 2024?  Yes  No

*If YES, please complete the following for property sold*

Street / Legal Address \_\_\_\_\_

Proceeds on disposition \_\_\_\_\_

Year property was purchased \_\_\_\_\_

5 Do you own foreign investments costing more than \$100,000?  Yes  No

*(excluding personal property ie. vacation home)*

6 Preferred format in which you would like to receive your 2024 Personal Tax Return and documents for signature

Via Client Portal

Via Email

Printed

7 Preferred method of having your records returned

Pick Up

Mail Out