

Please complete & return - with copies of current CRA Tax Assessments & latest RRSP & Investment statements to review tax liabilities. Without this information, we cannot offer advice or prepare tax returns fax back please		
Depart Date:	Return Date:	Family Depart Date: Return Date:
Name:	Spouse Name:	
Birthdate:	SIN: (Optional)	Birthdate: SIN : (Optional)
Status: Non-res. ? Rotation ?	Profession:	
Profession: Title (eg: P.Eng.)	Child 1 Name:	son/daughter
Employer/Current:	Child 2 Name:	son/daughter
Employer/Overseas:	Child 3 Name:	son/daughter
Overseas Term:	Overseas Country/City:	
Income Now: \$	Income Spouse Now: \$	
Income Overseas: \$		
House Value: \$	Mortgage: \$	
RRSP Home Owner Loan \$	Do you plan to Sell? Rent? Undecided? Rental Agency?	
<b>Address</b>		
Present Home	Overseas Company	Canadian Mail (c/o Name etc.)
RES: TEL	BUS: TEL	RES: TEL
BUS: TEL		BUS: TEL
RES: FAX	BUS: FAX	RES: FAX
EMAIL #1 :	BUS: EMAIL	RES: EMAIL
EMAIL #2 :		
<b>Canadian Contact While Overseas (relative other than spouse) Name:</b>		
Address:	BUS: TEL	RES: TEL
	BUS: EMAIL	or RES: EMAIL
<b>How Did You Hear of the Expatriate Group?</b> Referred by Whom? Company? Address & Tel? Which Magazine & Date? Other		
<b>Referrals (for our help/newsletter)</b>		
Name:	Telephone & Address:	

Your impending life-style change is considered a major stress factor in your life. Please review all forms are completed correctly, so that we can offer you "Peace of Mind". Please email or fax back to (403) 294-1222

**"How can I help you?" Money back guarantee - sign financial planning disclosure.**

<input type="checkbox"/> NR73(non-res.)	<input type="checkbox"/> Current Return "06"	<input type="checkbox"/> Prior Year Return	<input type="checkbox"/> Rental Tax Return	<input type="checkbox"/> Tax Advice
<input type="checkbox"/> Buy RRSP \$	<input type="checkbox"/> Buy RESP \$	<input type="checkbox"/> RRSP/Consolidate	<input type="checkbox"/> RRSP Management	<input type="checkbox"/> NR4/Redeem RSP, no tax
<input type="checkbox"/> Investment Review	<input type="checkbox"/> Cdn. Invest. Mgmt	<input type="checkbox"/> Offshore Investing	<input type="checkbox"/> Offshore Banking	<input type="checkbox"/> Currency Exchange
<input type="checkbox"/> Insurance: Life	<input type="checkbox"/> Insurance: Disability	<input type="checkbox"/> Insurance: Health	<input type="checkbox"/> Will: Update (living will)	<input type="checkbox"/> Will: New
<input type="checkbox"/> Retirement Plan	<input type="checkbox"/> Movers	<input type="checkbox"/> House Lease	<input type="checkbox"/> Concierge Services	<input type="checkbox"/> Overseas Liaison
<input type="checkbox"/> Managed Portfolio	<input type="checkbox"/> Reduce Invest. Risk	<input type="checkbox"/> Offshore Trusts	<input type="checkbox"/> Contract Review	<input type="checkbox"/> Disclosure/Fees
<input type="checkbox"/> Culture/Lifestyle/Retire	<input type="checkbox"/> Cultural Books	<input type="checkbox"/> Videos, Language	<input type="checkbox"/> Email Account	<input type="checkbox"/> Other:

Yes, I want Expat Services? 100%  , 75%  , 50%  , Partial  , Maybe  ? Est. Hrs \_\_\_\_\_ :

**Main reason for going overseas:** (client to complete when engaging services)

a) \_\_\_\_\_ b) \_\_\_\_\_

What's important about money, to you? (life/lotto)?

<b>Goals</b>	Year 1
	Year 1-3
	Year 3-10 (return to Canada/retirement)

**Main Reason your spouse is going overseas?**

What is your Spouse's career?

How Close are your spouse's family ties?

Your Hobbies/Sports/Interests?

Spouse Hobbies/Sports/Interests?

**Overseas Experience**

Overseas Employment: Where? \_\_\_\_\_ When? \_\_\_\_\_

Overseas Travel: Where? \_\_\_\_\_ When? \_\_\_\_\_

Spouse's Travels: Where? \_\_\_\_\_ When? \_\_\_\_\_

**Tax/Investment Planning we need copies of RSP and invest. statements to reduce taxes. Held with? (ie RBC)?**

Your Financial Planner/broker: \_\_\_\_\_ Firm: \_\_\_\_\_

Your Accountant: \_\_\_\_\_ Firm: \_\_\_\_\_

Real Estate (not home) \$ \_\_\_\_\_ Mortgage \$ \_\_\_\_\_ Debt (aside from mortgage) \$ \_\_\_\_\_

Fixed Assets: Furniture/Personal \$ \_\_\_\_\_ Auto Values: \$ \_\_\_\_\_

RRSP: Husband? \$ \_\_\_\_\_ Locked-in \$ \_\_\_\_\_ Spousal \$ \_\_\_\_\_

RRSP: Spouse? \$ \_\_\_\_\_ Locked-in \$ \_\_\_\_\_ Spousal \$ \_\_\_\_\_

Invest (non-RRSP): Husband \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Joint \$ \_\_\_\_\_

Problems/Solutions/Additional Questions:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_