

Form 1A**Client Review – The Expatriate Group Inc.**

Departure Date:		Family Departure Date:		Return Date:	
Name:			Spouse/Partner Name:		
Birthdate:		SIN: (Optional)	Birthdate:		SIN: (Optional)
Status: Non-res? Rotation?			Spouse/Partner Profession:		
Profession and Title (e.g. P.Eng.)			Child Name : Birthdate: Son/Daughter		
Current Employer:			Child Name : Birthdate: Son/Daughter		
Overseas Employer:			Child Name : Birthdate: Son/Daughter		
Overseas Term:					
Yearly Income Now:			Yearly Income Spouse/Partner:		
Yearly Income Overseas:					
House \$ Value:			House Mortgage Amount Remaining:		
Other Properties Owned or Rented:			Do you plan to Sell? Rent? Undecided?		
RRSP Home Owner Loan?			Do you plan to use a Property Rental Company?		
Address Information:					
Present Address:		Overseas Company Address:		Canadian Contact while overseas (Relative other than spouse/partner) Name:	
Present Res. Tel #:		Work#:		Canadian Contact Address:	
Personal Cell #:		Work Cell #:			
Other #:		Other #:			
Email #1:		Business Email:		Canadian Contact Home phone #:	
Email #2:				Work phone #:	
				Email:	
How Did You Hear of The Expatriate Group?					
Google		Yellow Pages		Work	Newsletter
Other					
If referred by someone please provide name:					

You can contact us by Email: Info@expat.ca *Tel: 403.232.8561 *Toll Free: 1.888.232-8561

*Fax 403.294.1222

How Can We help You? - Check All That Apply:				
•NR73 (Non Res.)	•Current Tax	•Prior Year Tax	•Rental Tax Return	•Tax Advice
•Buy RRSP	•Buy RESP	•RRSP/Consolidate	•RRSP Management	•NR4
•Invest Review	•Cdn. Invest Mgmt.	•Offshore Investing	•Offshore Banking	•Currency Exchange
•Life Insurance	•Disability Insurance	•Health Insurance	•Will: Update Existing	Will: New
•Retirement Planning	•Movers	•House Lease	•Concierge Services	•Overseas Liaison
•Managed Portfolio	•Reduce Invest Risk	•Offshore Trusts	•Contract Review	•Disclosure/Fees
•Culture/lifestyle/retire	•Cultural books	•Other:		
Yes I want Expat Services? 100% 75% 50% Partial Maybe Est. Hours _____				
Main Reason for Going overseas? _____				
Goals	Year 1			
Goals	Year 1-3			
Goals	Year 3-10 (return to Canada/retirement?)			
Main Reason your spouse/partner is going overseas? _____				
What is Spouse's/Partner's career? _____				
How close are you to your spouse's/partner's (family ties)? _____				
Overseas Experience				
Overseas Employment: Where?			When?	
Overseas Travel: Where?			When?	
Spouse's/Partner's Travels: Where?			When?	
Tax/Investment Planning - We need copies of RSP & Investment Statement to reduce taxes.				
Your Financial Planner/Broker:			Firm:	
Your Accountant			Firm:	
Real Estate (other than Home) Mortgage amount\$			Debt Aside from Mortgage \$:	
Fixed Assets: Furniture/Personal \$			Auto Values \$:	
RRSP: \$	Locked-in \$		Spousal \$	
RRSP Spouse/Partner : \$	Locked-in \$		RESP:	
Invest (Non RRSP)	Joint \$		Spouse/Partner \$	
Problems/Solutions/Additional Questions:				

