



Client Review 1 a/b

Personal Information

Status: Non Resident Rotation Resident Unknown

Departure Date (mm/dd/yy) Return Date (mm/dd/yy) Overseas Term

Full Name Birthdate

Profession Title (e.g. P. Eng.)

Employer Current Employer Overseas

Income Now Income Overseas

Overseas Country

Client Experience

Main reason for going overseas

- | | | | |
|---------------------------|-------------------|------------------|------------------|
| Cross Border Consultation | NR73 Review | Tax Advice | Asset Review |
| | Currency Exchange | Will Update | Insurance Review |
| | Contract Review | Residency Status | Closed Country? |
| | Cultural Books | Overseas Liason | Referrals |

What experience have you and or your partner had overseas? (where & when)

Canadian Contact

Name: E-mail Phone

Canadian Mail Address

How did you hear about us Google Work Who referred you to us?
Friend Other

Cross Border Residency Planning

We need full disclosure of your financial situation to advice on residency (tax) issues. Please provide RRSP statements & investment statements.

Do you have the following	RRSP	RESP	Joint
	Spousal	Real Estate	Vehicle
	Investment RRSP	Invest (non RRSP)	Locked In \$
Open Investments Where are they held?		Other: Value/type Where are they held?	
Loans	Cash		Locked in
House Value		Mortgage Outstanding	
Do you plan to	Rent	Sell	Rental Agency
	yes	no	Undecided?
Other properties?	yes	no	Home Buyers loan?
			yes
			no
Second property details			

Family Information

Spouse/Partner Full Name		Family Departure Date		Birthdate
Yearly Income		Profession		Marital Status
Child's Information	Son	Daughter	Name	Birthdate
Child's Information	Son	Daughter	Name	Birthdate
Child's Information	Son	Daughter	Name	Birthdate

Address Information

Present Address		Overseas Company Address
Canadian Phone Number	Personal E-mail	Phone Other
Work Phone	Business E-mail	Cell Phone

Problems / Solutions
- Additional questions