



Personal Information

Status: Non Resident Rotation
 Resident Unknown

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

Full Name Birthdate (mm/dd/yy)
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 while overseas (relative other than spouse/partner)

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 advise 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?

Value/type:

Loans

Cash

Locked in

House Value

Mortgage
Outstanding

Do you plan to

Rent

Sell

Rental Agency

Undecided?

Other properties?

yes

no

Home
Buyers loan?

yes

no

Second property
details

Family Information

Spouse/Partner
Full Name

Family Departure Date

Birthdate
(mm/dd/yy)

Yearly Income

Profession

Marital Status

Child's Information

Son

Daughter

Name

Birthdate
(mm/dd/yy)

Child's Information

Son

Daughter

Name

Birthdate
(mm/dd/yy)

Present Address:

Overseas Company
Address

Canadian Phone
Number

Personal
E-mail

Phone
Other

Work Phone

Business
E-mail

Cell
Phone

Problems / Solutions
- Additional questions