



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

Friend

Other

Who referred you to us?

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

- | | | |
|--|--|---------------------------------------|
| <input type="checkbox"/> RRSP | <input type="checkbox"/> RESP | <input type="checkbox"/> Joint |
| <input type="checkbox"/> Spousal | <input type="checkbox"/> Real Estate | <input type="checkbox"/> Vehicle |
| <input type="checkbox"/> Investment RRSP | <input type="checkbox"/> Invest (non RRSP) | <input type="checkbox"/> Locked In \$ |

Open Investments
Where are they held?

Value/type:

Loans

Cash

Locked in

House Value

Mortgage
Outstanding

Do you plan to

- | | | | |
|-------------------------------|-------------------------------|--|-------------------------------------|
| <input type="checkbox"/> Rent | <input type="checkbox"/> Sell | <input type="checkbox"/> Rental Agency | <input type="checkbox"/> 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