



Chartered Professional Accountant
 225 – 1855 Kirschner Road, Kelowna, BC V1Y 4N7
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PERSONAL TAX UPDATE FORM

Primary Contact

Name			
Has your phone, email or address changed?	<input type="checkbox"/> No <input type="checkbox"/> Yes	If changed:	
Is this person running a small business?	<input type="checkbox"/> No <input type="checkbox"/> Yes	Describe:	

Spouse / Common-Law Partner (after 12 months of co-habitation)

Name			
Has your phone, email or address changed?	<input type="checkbox"/> No <input type="checkbox"/> Yes	If changed:	
Is this person running a small business?	<input type="checkbox"/> No <input type="checkbox"/> Yes	Describe:	
Will Creekside Accounting be filing a tax return for this person?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, what is their net income:	

SERVICE PREFERENCES

Preferred contact method:	<input type="checkbox"/> Phone <input type="checkbox"/> Email <input type="checkbox"/> Text		
Paper Copy of Tax Returns (per family)	\$25	<input type="checkbox"/> Yes <input type="checkbox"/> No	A printed copy of your tax returns for those not quite ready to trust PDFs. We've got you covered. Request paper documents to have it done the 'good old-fashioned way'.
Expedited Services (per return)	\$25	<input type="checkbox"/> Yes <input type="checkbox"/> No	Jump the line and have your taxes prepared more quickly. We'll prioritize your return to get you in and out more quickly.
No-Hassel Document Return (per family)	\$35	<input type="checkbox"/> Yes <input type="checkbox"/> No	We'll package and mail your personal tax return paper documents to you upon the completion of your services. Save time on pickup by having your documents mailed.
Audit Response Package (per family)	\$95	<input type="checkbox"/> Yes <input type="checkbox"/> No	When purchased in conjunction with tax return services, an Audit Response package provides first-responder services in the event of an audit.

HIGH RISK TAX ISSUES

Principal Residence Inquiries

Have you sold a property in the past 18 months?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, provide the purchase and sale Statements of Adjustment	
Was this home your principal residence (PR)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you own any other property during the time you are designating this home as your PR?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Income Inquiries

Do you own any foreign property or foreign investments (including US stocks) with a total cost of more than \$100,000?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you are collecting rental income, please provide the property address:	

LIFE EVENTS

Has your marital status changed?	<input type="checkbox"/> No <input type="checkbox"/> Yes	Date of change:	New status:
Do you have any new dependents?	<input type="checkbox"/> No <input type="checkbox"/> Yes	Name, DOB, SIN, Relationship:	
Have you moved more than 40kms for work?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Approximate date of move	
Did you own the home you previously lived in and are now renting it out to collect rental income?	<input type="checkbox"/> Yes <input type="checkbox"/> No		

Questions / concerns for the accountant? _____

Name: _____ Date: _____