



Chartered Professional Accountant  
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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	

### 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	
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
Records format preference:	<input type="checkbox"/> Paper	<input type="checkbox"/> Electronic / PDF	
Would you like to purchase a \$95 Audit Response package for your family?	<input type="checkbox"/> Yes <input type="checkbox"/> No	When purchased in conjunction with tax return services, a \$95 Audit Response investment provides first-responder services free of charge in the event of an audit. Services are transferrable and can be used by any family member whose return is on the invoice.	
Would you like to expediate the preparation of your returns for \$25 per person?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Jump the line and have your tax returns prepared more quickly with a \$25 per person investment. We'll prioritize your returns to get you in and out more quickly.	
Would you like to save time and purchase a \$15 no hassle document return option?	<input type="checkbox"/> Yes <input type="checkbox"/> No	With a \$15 no hassle document return option we'll package and mail your families personal documents to you upon the completion of your tax services. Save time on pickup by saving your documents mailed.	

### 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 <b>purchase</b> and <b>sale</b> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, are you renting out this home?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Questions / concerns for the accountant? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_