

RETURNING CLIENT - UPDATE TO PERSONAL INFORMATION

Indicate if the following changes apply to you:	Yes/No/ Unsure	Provide further details about any changes
Change of legal name		
Change of gender		
Change of marital relationship status (including common-law)		
Had or adopted a child		
Change of mailing address		
Change of preferred phone number		
Change of email address		
Change of occupation (i.e. if you would describe your occupation differently)		
Obtained or changed tax ID # (U.S. or Canadian)		
Change of Canadian immigration status (chose from following):		
Obtained Canadian citizenship		
Obtained Canadian permanent resident immigration status		
Obtained Canadian immigration visa		
Loss/expiration of previous Canadian immigration status		
Change of U.S. immigration status (choose from following):		
Obtained U.S. citizenship		
Renounced U.S. citizenship		
Applied for U.S. lawful permanent resident status (i.e. to receive green card)		
Received U.S. lawful permanent resident status (i.e. obtained green card)		
Surrendered green card and obtained official I-407 form		
Obtained U.S. immigration visa		
U.S. immigration visa expired		
Switched my tax preparer or investment advisor		