



NEWclientintakeform

Full Name _____

Full Address _____

Date of Birth: _____ SIN: _____

Cell Phone #: _____ email (required): _____

Please answer the following questions:

Yes No

- **Do you own or operate a Rental Property?**

If yes, please request a 776 Real Estate Rentals form from us.

- **Did you own or hold foreign property at any time during the year with a total cost of more than \$100,000 Canadian?**

If yes, please provide supporting documents and details.

- **Did you sell your principal residence during the year?**

If yes, please provide supporting documents and details.

- **Did your marital status change during the tax year?**

If yes, Date of marriage or date of separation or divorce _____

- **Did you have any new dependents join your family during the year?**

If yes, please provide details below:

- Full name: _____ Date of Birth: _____

PRIVACY: The information requested to be provided is required by MBS Plus to assist in the preparation of personal income tax returns. Use and custody of this information will be in accordance with the firm's Privacy Policy Statement, a copy of which may be reviewed at our office or obtained upon request. Your provision of personal information to MBS Plus implies your consent to its use as per the privacy and terms of engagement.