

ALBERTA TAX SERVICE LTD.

Returning Client Information Sheet

Updated Address? Please fill out below:

Type of return: Personal Business GST

Current Phone Number: _____

Email Address: _____

First Name: _____ Last Name: _____

Mailing Address: _____

City: _____ Province: _____ Postal code: _____

*****DID YOU SELL YOUR HOME OR PROPERTY IN THE TAX YEAR FOR WHICH YOU ARE CLAIMING A PRINCIPAL RESIDENCE EXEMPTION? YES: _____ NO: _____**

If Yes Above: Purchase year _____ Value at sale \$ _____

Address: _____

Alone on Title? No 50/50 Spouse: _____ No 50/50 Other: _____ Yes: _____

*****Did you own any foreign property valued over \$100,000 at any time in the tax year?**
YES: _____ NO: _____

Did your Marital Status Change in the Tax Year? Please fill out below:

Married Common-law Widowed

Divorced Separated Single

Please note, if your status changed in the tax year, please include **Date marital status changed**

Spouse info: Male _____ Female _____

First Name: _____ Last Name: _____

SIN: _____ Birthdate: Year _____ Month _____ Day _____

Spouse's annual income (include if **NOT** being prepared by Alberta Tax Service Ltd): \$ _____

Spouse Current Phone Number: _____

Spouse Email Address: _____

New Dependant in the Tax Year? Please fill out below:

First Name: _____ Last Name: _____

Birthdate: Year _____ Month _____ Day _____ Male Female