

## Accounting & Taxes - Changes / Updates Form

**Meeting Date:** \_\_\_\_\_ **ID Copy:**  Yes  No

### Significant Changes

Please let us know if there have been significant changes in your life during the last year that may affect your accounting and/or tax situation. The following is a list of possible significant changes:

Yes      No

Yes	No	
		Did your phone number or email contact change?
		Did you move in / move out of Canada?
		Has your marital status changed?
		Has your last name changed?
		Has there been an addition in your family (birth, adoption, elder care)?
		Has there been a death in your family?
		Did your home address change?
		Did you buy / sell your principal residence?
		Did you purchase an investment property?
		Did you withdraw from RRSP under HBP / LLP?
		Did you start a new job? Did you switch jobs?
		Did you start / finish post-secondary education?
		Were you a recipient of employment insurance benefits?
		Were you a recipient of any disability support payments?
		Did you make any donations to any charitable organizations?
		Did you incur childcare expenses?
		Did you have any investment income (rental, dividends, interest, gains)?
		Was there any income (investment, business, etc.) from the US?
		Did you acquire any foreign investments?
		Did you become self-employed?
		Did you start a new business?
		Did you incur moving expenses due to a change in employment?
		Did you qualify for retirement and start receiving pension incomes?