

## Client Information for a New Client

Date received: \_\_\_\_\_ Number (office use only): \_\_\_\_\_

Name: \_\_\_\_\_ Date of birth(dd/mm/yy): \_\_\_\_\_ SIN: \_\_\_\_\_

Email address: \_\_\_\_\_

Company name if corporate client: \_\_\_\_\_

Phone #: (B): \_\_\_\_\_ (H): \_\_\_\_\_

(Cell): \_\_\_\_\_ Fax #: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Marital status: \_\_\_\_\_ Spouse name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ SIN #: \_\_\_\_\_

Dependant / Children's names: \_\_\_\_\_

Dependant / Children's date of birth: \_\_\_\_\_

Dependant / Children's SIN if available: \_\_\_\_\_

**Please take few moments to fill out the following to help us serve you better.**

Have you been given our tax letter? If not, then please ask for a copy or visit [www.goreca.com](http://www.goreca.com)

Please make sure you have provided us with all the information that applies to you.

Referred by: \_\_\_\_\_

**Any special information that we should be aware of:**

**Outstanding questions (for office use only)- Please note that return will not be started if missing data**

Incomplete, information needed: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date called: \_\_\_\_\_ By: \_\_\_\_\_