

Kindly update your information for our files (even if you think we have it!)

Name: _____

Current address (incl. postal code) _____

Phone number: Home/work _____
Cell _____

Email address: _____ *

* COMING SOON: important tax information sent right to your inbox!

Please check here to opt out

Return 2021 taxes with FedEx (\$15 charge will apply) _____

E-courier (paper copies will not be held at office) _____

DID YOU SELL A PROPERTY IN 2021? Y N

If yes, please provide

Address _____

Year of purchase _____

Was this property your principal dwelling for all of the

years owned?* Y N

* if N then please contact Dana

DID YOU HAVE MORE KIDS??? (believe it or not, people forget to tell us this!)

Name: _____ M F

Date of Birth: _____

ARE YOU A FIRST TIME HOME BUYER? Y N