

The Lupton/Cook Financial Group

Please complete this client update form and include it with your tax information

Tax Year: _____

Name: _____ Date of Birth: _____

Address: _____

Phone: _____ Email: _____

Did you sell your principal residence or other property this tax year? **YES OR NO**

Home Buyers Repayment Amount: \$ _____

Marital Status: (Please circle One)

Single Married Divorced Widowed Common-Law Separated

Spouse's Name: _____

Spouse's Birth Date: _____ Spouse's SIN: _____

Dependent's Name:	Date of Birth
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

Amount of Rent: \$ _____ # of Months: _____ Landlords Name: _____ or

Property Taxes: \$ _____ Paid to (municipality): _____

Notes:
