



Foreign Bank & Financial Accounts Reporting (worksheet)

CLIENT NAME _____ Social Security # _____ Tax Year _____

Institution	Acct #	Branch address	Account Type	Maximum acct	Joint acct
<i>Example: TD Bank</i>	<i>#123456-78-9</i>	<i>Home branch or head office</i>	<i>Bank acct / RRSP / Investment</i>	Value (in tax year)	(circle one)
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No
				\$	Yes / No

NOTE: Each person must do their own complete form (there are no joint FBAR forms) - List all joint accounts on both forms for each spouse