

## Foreign Bank Account Reporting Worksheet:

Name: \_\_\_\_\_

Please list one account at a time (If more than 2 accounts print out more of these and number them):

### Bank Account #1

I am the only one with signatory authority over this account;

I have joint signatory authority over this account with my \_\_\_\_\_.

Full Name, social security #, and address of the person you share the bank account with:

\_\_\_\_\_  
\_\_\_\_\_

Maximum amount you had in this account during the calendar year: \_\_\_\_\_

Type of account:  Checking & Savings  Investment or Retirement Account  Other \_\_\_\_\_

Bank Name \_\_\_\_\_

Account Number \_\_\_\_\_

Bank Street Address \_\_\_\_\_ City: \_\_\_\_\_

State/Province \_\_\_\_\_ Country: \_\_\_\_\_

Postal/Zip Code \_\_\_\_\_

### Bank Account #2

I am the only one with signatory authority over this account;

I have joint signatory authority over this account with my \_\_\_\_\_.

Full Name, social security #, and address of the person you share the bank account with:

\_\_\_\_\_  
\_\_\_\_\_

Maximum amount you had in this account during the calendar year: \_\_\_\_\_

Type of account:  Checking & Savings  Investment or Retirement Account  Other \_\_\_\_\_

Bank Name \_\_\_\_\_

Account Number \_\_\_\_\_

Bank Street Address \_\_\_\_\_ City: \_\_\_\_\_

State/Province \_\_\_\_\_ Country: \_\_\_\_\_

Postal/Zip Code \_\_\_\_\_

**Please mail, fax or email this to: Rose Tax & Financial, 605 Edwards Avenue, West Dundee, IL 60118 Phone: (847)715-8930 Fax: (815)301-2671 [jenyarose@gmail.com](mailto:jenyarose@gmail.com)**