

## 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 email, fax or mail this to: Rose Tax & Financial, 8 Pinon Avenue Cedar Crest, NM 87008**

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