

**CANADIAN RRSP/RRIF AND PENSION PLAN ORGANIZER**

IMPORTANT INFORMATION  
(EXPLANATION OF THE REASON THIS INFORMATION IS REQUIRED)

The income (interest, dividends, capital gains, etc.) that is earned inside your Canadian RRSP's, RRIF's, and certain registered pension plans and deferred profit sharing plans is taxable to you annually in the United States in the year it is earned inside the pension plan (even if it is not paid to you) unless:

- 1) The plan meets the requirements of Section 402(b) of the U.S. Internal Revenue Code, or
- 2) You make a special election under the tax treaty.

Therefore please provide the following information:

**SECTION A**

(CALENDAR YEAR \_\_\_\_\_)

**INFORMATION FOR CANADIAN REGISTERED PENSION PLANS AND DEFERRED PROFIT SHARING PLANS,  
OTHER THAN RRSP'S AND RRIF'S**

*PLEASE DO NOT LIST RRSP/RRIF INFORMATION HERE – USE THE REVERSE SIDE  
(PLEASE SEE SECTION B, REVERSE SIDE)*

	<u>TAXPAYER</u>		<u>SPOUSE</u>	
	<u>Plan #1</u>	<u>Plan #2</u>	<u>Plan #1</u>	<u>Plan #2</u>
Plan Account Number	_____	_____	_____	_____
Name of Plan Trustee (i.e. the Institution Where the Plan is Administered)	_____	_____	_____	_____
Address of Trustee	_____	_____	_____	_____
Contributions to the Plan during the calendar year of your current tax return.	_____	_____	_____	_____

Was either spouse a U.S. citizen or resident at any time when you contributed to the above plan(s)? [ ] Yes [ ] No

If yes, did you report as taxable income on your U.S. income tax return either:  
1) Your contributions to the plan, or 2) the earnings inside the plan. [ ] Yes [ ] No

Please complete the next page also



**CANADIAN RRSP/RRIF AND PENSION PLAN ORGANIZER (CONTINUED)**

**SECTION B (CALENDAR YEAR \_\_\_\_\_)**

**INFORMATION FOR CANADIAN REGISTERED RETIREMENT SAVINGS PLANS (RRSP'S), REGISTERED RETIREMENT INCOME PLANS (RRIF'S) AND EQUIVALENT PLANS.**

Please forward a copy of your year-end statement for each plan.

<b><u>TAXPAYER</u></b>	<b><u>ACCOUNT 1</u></b>	<b><u>ACCOUNT 2</u></b>	<b><u>ACCOUNT 3</u></b>
1. Trustee (Administrator of the plan)	_____	_____	_____
2. Address of Trustee:	_____	_____	_____
3. Plan account number:	_____	_____	_____
4. The balance in the Plan at the beginning of your tax year for which the tax return is being filed	_____	_____	_____
5. a) Withdrawals during the current tax year:	_____	_____	_____
b) Rollover to/from another plan during the Current tax year	_____	_____	_____
6. Contributions you made to the Plan	_____	_____	_____
7. Balance in the plan at year-end (12/31):	_____	_____	_____
8. Approximately what year did you first contribute to the RRSP.	_____	_____	_____

<b><u>SPOUSE</u></b>	<b><u>ACCOUNT 1</u></b>	<b><u>ACCOUNT 2</u></b>	<b><u>ACCOUNT 3</u></b>
1. Trustee (Administrator of the plan)	_____	_____	_____
4. Address of Trustee:	_____	_____	_____
5. Plan account number:	_____	_____	_____
4. The balance in the Plan at the beginning of your tax year for which the tax return is being filed	_____	_____	_____
5. a) Withdrawals during the current tax year:	_____	_____	_____
c) Rollover to/from another plan during the Current tax year	_____	_____	_____
6. Contributions you made to the Plan	_____	_____	_____
7. Balance in the plan at year-end (12/31):	_____	_____	_____
8. Approximately what year did you first contribute to the RRSP.	_____	_____	_____

Was either spouse a U.S. citizen or resident at any time when you contributed to the above plan(s)? [ ] Yes [ ] No

If yes, did you report as taxable income on your U.S. income tax return either:

1) Your contributions to the plan, or 2) The earnings inside the plan. [ ] Yes [ ] No

