

**ORGANIZER FOR CANADIAN PENSION PLANS; RESP AND TFSA; RRSP AND RRIF****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 C, 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 and Address of Plan Trustee (i.e. the Institution Where the Plan is Administered)	_____	_____	_____	_____
Contributions to the Plan during the calendar year of the 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 <u>inside</u> the plan.			[ ] Yes [ ] No	

**SECTION B (CALENDAR YEAR \_\_\_\_\_)****INFORMATION FOR RESP AND TFSA**

Please forward a copy of your December 31<sup>st</sup> year-end statement for each plan.

	<u>TAXPAYER</u>		<u>SPOUSE</u>	
	<u>Account #1</u>	<u>Account #2</u>	<u>Account #1</u>	<u>Account #2</u>
Plan Account Number	_____	_____	_____	_____
Name and Address of Plan Trustee (i.e. the Institution Where the Plan is Administered)	_____	_____	_____	_____
Contributions to the Plan during the calendar year of the current tax return.	_____	_____	_____	_____
Balance in the plan at year-end (12/31):	_____	_____	_____	_____

**ORGANIZER FOR CANADIAN PENSION PLANS; RESP AND TFSA; RRSP AND RRIF**  
**(CONTINUED)**

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

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

Please forward a copy of your December 31<sup>st</sup> year-end statement for each plan.

<u>TAXPAYER</u>	<u>ACCOUNT 1</u>	<u>ACCOUNT 2</u>	<u>ACCOUNT 3</u>
1. Trustee (Administrator of the plan)	_____	_____	_____
2. Address of Trustee:	_____	_____	_____
3. Plan account number:	_____	_____	_____
4. The balance in the Plan at the beginning of the tax year for which the tax return is being filed (the "current year")	_____	_____	_____
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 during the "current year"	_____	_____	_____
7. Balance in the plan at year-end (12/31):	_____	_____	_____

<u>SPOUSE</u>	<u>ACCOUNT 1</u>	<u>ACCOUNT 2</u>	<u>ACCOUNT 3</u>
1. Trustee (Administrator of the plan)	_____	_____	_____
2. Address of Trustee:	_____	_____	_____
3. Plan account number:	_____	_____	_____
4. The balance in the Plan at the beginning of the tax year for which the tax return is being filed (the "current year")	_____	_____	_____
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 during the "current year"	_____	_____	_____
7. Balance in the plan at year-end (12/31):	_____	_____	_____

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