

Date \_\_\_\_\_

**Part One:** Please provide the highest balance during the year for **all financial accounts** in their original currency. You **MUST** include **ALL** types of accounts (checking, savings, retirements, pensions, life insurance policies, investment accounts, etc.). Use additional sheets as necessary.

| Bank Name | Bank Address | Account Number | Account Type | Joint account, with whom? | Currency | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|-----------|--------------|----------------|--------------|---------------------------|----------|------|------|------|------|------|------|------|
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |
|           |              |                |              |                           |          |      |      |      |      |      |      |      |

**Part Two:** Please provide the **Dec. 31<sup>st</sup> balance/value** in original currency for **retirement accounts only** (pension, annuity, superannuation, RRSP/LIRA/ RRIF/LIF,etc.).

| Bank Name | Bank Address | Account Number | Account Type | Currency | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|-----------|--------------|----------------|--------------|----------|------|------|------|------|------|------|------|
|           |              |                |              |          |      |      |      |      |      |      |      |
|           |              |                |              |          |      |      |      |      |      |      |      |
|           |              |                |              |          |      |      |      |      |      |      |      |
|           |              |                |              |          |      |      |      |      |      |      |      |