

Tax Organizer Supplement – Foreign Assets

(If you answer yes to any of the statements below, please initial below.)

- (1) During calendar year 2023 I/we had a financial interest in or signature authority over a financial account (such as a bank account, security, investment or brokerage account, etc.) located in a country other than the United States? Yes ____ No ____
- (2) I, as a single individual or as a married individual filing separately, had aggregate Specified Foreign Financial Assets on the last day of 2023 in excess of \$50,000 or in excess of \$75,000 at any time during calendar year 2023. Yes ____ No ____
- (3) We, being married and filing a joint tax return, had aggregate Specified Foreign Financial Assets on the last day of 2023 in excess of \$100,000 or in excess of \$150,000 at any time during 2023. Yes ____ No ____
- (4) During 2023 I/we received a distribution from or made a transfer to a Foreign trust. Yes ____ No ____

Initial: _____ Date: _____

Initial: _____ Date: _____