



SKJ & Company, P.S.
Certified Public Accountant

FBAR & FATCA REPORTING INFORMATION

Please refer to the following information for your FBAR and FATCA reporting.

1. Financial Accounts / Assets
 - a. Following types of foreign accounts and assets are subject to the reporting requirements:
 - i. Regular checking and savings account
 - ii. Securities (Stocks and mutual funds) and Bonds
 - iii. Whole Life Insurance
 - b. Real estate is generally not subject to the reporting requirements. However, if a real estate is owned by an entity and you have ownership in the entity, the ownership is subject to the reporting requirement.
 - c. Please provide the following information for the above accounts/assets:
 - i. Bank name, Branch name & account number
 - ii. Whether the account was opened or closed during the year
 - iii. Type of accounts/assets
 - iv. Maximum value/balance of the account/asset
 1. Please note: maximum value is reported, not the year-end balance.
 2. If the account is closed during the year, please make sure to include the account.
 - d. Please fill out the above information in the worksheet provided (next page).
2. Foreign Financial / Investment Income
 - a. If the above account or asset is generating income, please provide a statement that includes:
 - i. The amount of income and type (interest, dividend...etc.)
 - ii. Foreign taxes paid/withheld
 - b. Foreign income other than investment income is also subject to US tax.
Please contact our office if you have other types of income from overseas.

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Bank Name	Branch Name	Account No.	Account Type	Maximum Value / Balance	New	Closed
Ex) ABC Bank	Lynnwood Branch	111-23-456789	Saving Account	\$1,500	<input type="checkbox"/>	<input type="checkbox"/>
Ex) ABC Life Insurance	Edmonds Branch	1234-56-789	Life Insurance	\$100,000	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
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