

THE TAX GALS

Jeanne L. Watkins, E.A.
200 Station Way #B
Arroyo Grande, CA 93420
Phone: (805) 489-6590 Fax: (805) 489-3593

Foreign Asset Disclaimer

My (Our) 2016 Federal and California income tax returns have been prepared by you.

You have made me aware that U.S. taxpayers are required to report their worldwide income, that is, income from both U.S. and foreign sources. In addition, taxpayers who own, have an interest in, or have signature or other authority over assets in a foreign country may be required to report the existence of the asset.

I (We) have reported to you any and all foreign assets in which we have either ownership or signature authority. This includes, but is not limited to, funds in foreign financial institutions, real estate, rights to foreign pension plans, rights to distributions from foreign estates or trusts, like insurance with cash surrender values, or any other foreign assets. It does not include stocks in foreign countries held by U.S. brokerage companies.

Date: _____ Taxpayer: _____ Spouse: _____

Please read, date and sign this letter