

Roth IRA Account Balances on Date of Move to Canada

Individuals who moved to Canada during the year will need to file a Roth IRA election with their Canadian tax return to elect that the Roth IRA is treated with the same tax-deferred status in Canada as it would be in the U.S.

List each Roth IRA you own and complete the additional information below. If you own more than 3 Roth IRAs, you may complete multiple versions of this organizer.

Please also provide the Roth IRA investment statements from the month end before and after coming to Canada for all accounts.

	Roth IRA #1	Roth IRA #2	Roth IRA #3
Name of account owner			
Account number			
Financial institution name and address			
Date the account was opened			
Fair market value of the account on the day you arrived in Canada (in USD)			

Roth IRA Contributions After Date of Move to Canada

Complete the following section only if you continued to make contributions to your Roth IRA after the day you arrived in Canada (i.e. your tax residency date).

Note – contributions include cash contributions as well as rollovers from traditional IRAs. Include information from any traditional retirement plan rollovers into the Roth IRA(s) after moving to Canada below.

The following contributions were made to the Roth IRA(s) after moving to Canada:

	Roth IRA #1	Roth IRA #2	Roth IRA #3
Account number			
Date of contribution			
Amount of contribution (in USD)			

Or, if there have been no contributions made to any of your Roth IRAs after moving to Canada, please confirm this below:

I confirm there have been no Roth IRA contributions made after my move to Canada