



SWEENEY BRIDE

STRATEGIC WEALTH ADVISORY

2025 FOREIGN PROPERTY ORGANIZER

INCLUDE INCOME EARNING REAL ESTATE, BANK ACCOUNTS, FOREIGN SECURITIES AND STOCKS. DO NOT INCLUDE AMOUNTS HELD AS BUSINESS PROPERTY, IN REGISTERED ACCOUNTS OR IN MUTUAL FUNDS HELD WITH CANADIAN INSTITUTIONS.

YOUR NAME	
SPLIT WITH SPOUSE/PARTNER Y/N/COMMENT	

TOTAL COST OF SPECIFIED FOREIGN PROPERTY HELD AT ANY TIME DURING THE YEAR	
A) HOLDINGS (CAD) > \$100,000 BUT < \$250,000 Y/N	<input type="checkbox"/>
B) HOLDINGS (CAD) > \$250,000 Y/N	<input type="checkbox"/>

TYPE OF PROPERTY	CHECK ALL THAT APPLY
FUNDS HELD OUTSIDE CANADA	<input type="checkbox"/>
SHARES OF NON-RESIDENT CORPORATIONS NOT INCL. FOREIGN AFFILIATES	<input type="checkbox"/>
INDEBTEDNESS OWED BY NON-RESIDENT	<input type="checkbox"/>
INTERESTS IN NON-RESIDENT TRUSTS	<input type="checkbox"/>
REAL PROPERTY OUTSIDE CANADA NOT INCL. PERSONAL USE, OR BUSINESS HOLDINGS	<input type="checkbox"/>
OTHER PROPERTY OUTSIDE CANADA	<input type="checkbox"/>
PROPERTY HELD IN AN ACCOUNT W/ REGISTERED CANADIAN SECURITIES DEALER/ TRUST COMPANY	<input type="checkbox"/>

SIMPLE METHOD FOR A)		
TOP THREE COUNTRIES		
BASED ON MAX COST HELD DURING THE YEAR		
GROSS INCOME	GAIN(LOSS)	
FROM ALL FOREIGN PROPERTY	FROM DISPOSITION OF FOREIGN PROPERTY	





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DETAILED METHOD FOR B)				
FUNDS HELD OUTSIDE CANADA				
NAME OF BANK / OTHER ENTITY HOLDING THE FUNDS	COUNTRY	MAX FUNDS IN YEAR	YEAR-END FUNDS	GROSS INCOME
SHARES OF NON-RESIDENT CORPORATIONS				
NAME OF CORPORATION	COUNTRY	MAX FUNDS IN YEAR	YEAR-END FUNDS	GROSS INCOME
INDEBTEDNESS OWED BY NON-RESIDENT				
NAME DESCRIPTION OF INDEBTEDNESS	COUNTRY	MAX FUNDS IN YEAR	YEAR-END FUNDS	GROSS INCOME
INTERESTS IN NON-RESIDENT TRUSTS				
NAME OF TRUST	COUNTRY	MAX FUNDS IN YEAR	YEAR-END FUNDS	GROSS INCOME
REAL PROPERTY OUTSIDE OF CANADA				
NAME DESCRIPTION OF PROPERTY	COUNTRY	MAX FUNDS IN YEAR	YEAR-END FUNDS	GROSS INCOME
OTHER PROPERTY OUTSIDE OF CANADA				
NAME DESCRIPTION OF PROPERTY	COUNTRY	MAX FUNDS IN YEAR	YEAR-END FUNDS	GROSS INCOME
PROPERTY HELD IN AN ACCOUNT W/ CANADIAN REGISTERED SECURITIES DEALER/TRUST CO.				
NAME OF REGISTERED SECURITY DEALER / TRUST COMPANY	COUNTRY	MAX FUNDS IN YEAR	YEAR-END FUNDS	GROSS INCOME

