

**U.S. Information Return for Beneficiaries of  
Certain Canadian Registered Retirement Plans**

OMB No. 1545-0074

▶ Attach to Form 1040.

Department of the Treasury  
Internal Revenue Service

For calendar year 20 , or tax year beginning , 20 , and ending , 20 .

▶ Information about Form 8891 and its instructions is at [www.irs.gov/form8891](http://www.irs.gov/form8891).Attachment  
Sequence No. **139**

Name as shown on Form 1040

Identifying number (see instructions)

Address

City, state, zip

<b>1</b> Name of plan custodian	<b>2</b> Account number of plan
<b>3</b> Address of plan custodian Addr City State Zip If foreign country enter Country Province Postal Code	<b>4</b> Type of plan (check one box): <input type="checkbox"/> Registered Retirement Savings Plan (RRSP) <input type="checkbox"/> Registered Retirement Income Fund (RRIF)

**5** Check the applicable box for your status in the plan (see Definitions in the instructions):

- ☐ Beneficiary  
☐ Annuitant (Complete only lines 7a, 7b, and 8.)

**6a** Have you previously made an election under Article XVIII(7) of the U.S.-Canada income tax treaty to defer U.S. income tax on the undistributed earnings of the plan? . . . . . ▶ ☐ Yes ☐ No**b** If "Yes," enter the first year the election came into effect \_\_\_\_\_ and go to line 7a. If "No," go to line 6c.**c** If you have not previously made the election described on line 6a above, you can make an irrevocable election for this year and subsequent years by checking this box . . . . . ▶ ☐

<b>7a</b> Distributions received from the plan during the year. Enter here and include on Form 1040, line 16a . . . . .	<b>7a</b>	
<b>b</b> Taxable distributions received from the plan during the year. Enter here and include on Form 1040, line 16b . . . . .	<b>7b</b>	
<b>8</b> Plan balance at the end of the year. If you checked the "Annuitant" box on line 5, the "Yes" box on line 6a, or the box on line 6c, <b>stop here. Do not</b> complete the rest of the form . . . . .	<b>8</b>	
<b>9</b> Contributions to the plan during the year . . . . .	<b>9</b>	
<b>10 Undistributed earnings of the plan during the year:</b>		
<b>a</b> Interest income. Enter here and include on Form 1040, line 8a . . . . .	<b>10a</b>	
<b>b</b> Total ordinary dividends. Enter here and include on Form 1040, line 9a . . . . .	<b>10b</b>	
<b>c</b> Qualified dividends. Enter here and include on Form 1040, line 9b . . . . .	<b>10c</b>	
<b>d</b> Capital gains. Enter here and include on Form 1040, line 13 . . . . .	<b>10d</b>	
<b>e</b> Other income. Enter here and include on Form 1040, line 21. List type and amount ▶ _____ _____	<b>10e</b>	