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TAX & ADVISORY

U.S. TAXPAYERS ABROAD

U.S. Taxpayer Abroad Preparation Checklist

Living abroad can add extra records to tax time. Start with your recent returns, income and travel dates, and we will work through the overseas details with you.

START HERE

1. Previous U.S. and foreign tax returns
2. Income and foreign-tax records
3. Dates you lived, traveled and worked in each country

Download and save this PDF first. Tick records you have, skip items that do not apply and add questions on the last page. Save again after making changes, or print and write by hand.

Keep ID numbers, PINs and bank details out of this checklist. We will explain how to share sensitive documents securely.

01 Start with your recent returns and changes

- ☐ Gather previous U.S. federal and state returns, amended returns and foreign tax returns.
- ☐ Tell us about citizenship, residency, visa or household changes.
- ☐ Have identity and taxpayer-ID records ready to share securely. Do not write the numbers here.
- ☐ Tell us about unfiled years, tax letters and approaching response deadlines.
- ☐ Bring previous foreign-income elections, foreign-tax-credit carryover schedules and supporting tax workpapers, if available.

02 Where you lived, traveled and worked

- ☐ Prepare a dated travel calendar showing countries visited and days spent in the United States.
- ☐ Note where you physically worked, including remote work and business trips.
- ☐ Gather residence, housing and employment documents for your time abroad.
- ☐ List U.S. homes, work, licenses and family connections, along with your state filing history, for our review.
- ☐ Tell us if you moved abroad, returned to the United States or changed countries during the year.

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03 Income from the U.S. and abroad

- [ ] Gather U.S. and foreign wage, benefit, bonus and self-employment records.
- [ ] Bring interest, dividend, investment-sale and rental records from every country that applies to you.
- [ ] Gather pension contribution, payment and benefit records, including non-U.S. plans.
- [ ] Tell us about income that was not reported on a U.S. tax form.
- [ ] Keep original amounts, currencies and transaction dates, along with any exchange rates already used.
- [ ] Keep overseas housing-cost records separate so we can review whether they are relevant.

04 Foreign taxes and your local advisor

- [ ] Gather foreign tax assessments, withholding records and payment confirmations by year and income type.
- [ ] Tell us about refunds, revised assessments, disputes or taxes covering a different tax period.
- [ ] Keep payment dates, dates taxes accrued and original currencies, as well as any converted totals.
- [ ] Let us know who advises you in your country of residence and which work they handle.
- [ ] Bring details of any employer arrangement to reimburse or equalize your taxes.

05 Overseas accounts and assets - if applicable

- [ ] Prepare a list of overseas accounts for secure delivery, including joint accounts and accounts closed during the year.
- [ ] Mention accounts you can sign for even if the money is not yours, so we can review them.
- [ ] Gather statements showing the highest balances during the year and year-end values.
- [ ] Gather ownership details, opening and closing dates, institution locations and account currencies.
- [ ] Bring previous FBAR and Form 8938 filings and confirmations, if any.
- [ ] Keep account numbers in the secure document system, not in this checklist.

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06 Other overseas interests to discuss early

- [ ] Tell us about foreign mutual funds, other investment funds and insurance-based investment products.
- [ ] Mention any ownership or control of foreign corporations, partnerships or other businesses.
- [ ] Bring records of trusts, foundations, large foreign gifts or inheritances.
- [ ] Tell us about foreign pensions, ownership changes, property sales or changes in citizenship or residency.
- [ ] If international forms were missed in an earlier year, tell us before deciding how to address them.

07 Before we get started

- [ ] Make a short list of anything missing or being corrected, and when you expect it.
- [ ] Tell us early about tax letters, deadlines or questions from a previous year.
- [ ] We will confirm the U.S. returns and any additional reporting included. Local-country tax work is agreed separately with the appropriate advisor.
- [ ] Ask us how to share documents securely and confirm who can approve the work.
- [ ] We will explain the next steps for questions, reviewing your return, signatures and filing confirmation.

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Questions and anything still missing

You can contact us before this checklist is complete.

Tax year or period

Questions, missing records or next steps (no sensitive identifiers)

A checked box means you have the record available. This is a general preparation guide; we may ask for additional information for your circumstances. It does not determine tax eligibility or replace individual advice.

Helpful official references

IRS · U.S. citizens and resident aliens abroad

IRS · Publication 54, U.S. taxpayers abroad

IRS · Comparing Form 8938 and FBAR

FinCEN · Foreign bank and financial accounts

Updated September 27, 2026. Use records and official guidance for the relevant tax year.