# Americans abroad organizer

For U.S. citizens and green card holders who lived or worked outside the United States. Your travel dates and account balances decide which forms you need.

## Where you live

Name

Tax year

Country of residence

Date you moved abroad

Visa or residency type

Employer or business abroad

Last U.S. state you lived in

## Time in the United States

List every visit during the year and the 12 months around it. A full day abroad is a full 24 hours.

| Arrived in the U.S. | Left the U.S. | Reason for the visit | Days in the U.S. |
|---|---|---|---|
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**Total days in the United States (enter a number of days)** $

## Income and tax abroad

Foreign wages or business income

Currency

Foreign income tax paid

Housing costs paid abroad

Did you have self-employment income? ☐ Yes ☐ No

Did you receive U.S. rent, dividends, interest or a pension? ☐ Yes ☐ No

Have you filed U.S. returns for every year since you moved? ☐ Yes ☐ No

## Foreign financial accounts

Bank, savings, brokerage, pension and mobile money accounts you own or can sign on. Report the highest balance at any time in the year.

| Bank or institution | Country | Type | Last 4 digits | Highest balance | Currency |
|---|---|---|---|---|---|
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**FBAR.** If all your foreign accounts together were above $10,000 at any moment in the year, you file an FBAR with the Treasury. It is a report, not a tax, but the penalties for missing it are high. Larger holdings also go on Form 8938 with your return. Do not write full account numbers here; upload statements to your secure client vault.

## Other things abroad

Each of these can add a form to your return. Tell us even if the amounts are small.

| | | |
|---|---|---|
| Do you own part of a foreign company or partnership? | ☐ Yes | ☐ No |
| Do you have a foreign pension or retirement plan? | ☐ Yes | ☐ No |
| Did you receive a gift or inheritance from abroad of more than $100,000? | ☐ Yes | ☐ No |
| Do you own rental property outside the United States? | ☐ Yes | ☐ No |
| Did you sell a home or other property abroad this year? | ☐ Yes | ☐ No |
| Does your spouse have a Social Security number or an ITIN? | ☐ Yes | ☐ No |

## Upload with this organizer

- ☐ Foreign wage statements or tax return
- ☐ Passport pages with entry and exit stamps
- ☐ Your last U.S. tax return
- ☐ Year-end statements for each foreign account
- ☐ Lease or housing cost records abroad
- ☐ Any IRS letters received abroad

People living abroad have until June 15 to file without asking for more time, but tax owed is still due April 15. If you are behind on past years, the IRS has streamlined procedures for people who did not know they had to file. We can walk you through them.