

Your work-abroad tax facts

Use this organizer for a U.S. tax review before assuming the move reduces tax.

Use account nicknames only. Do not enter passwords, full account numbers or SSNs.

Tax year / filing status / citizenship or U.S. tax residency question

Travel calendar: country / arrival / departure / U.S. visits / transit dates

Work facts: where services are performed / employer or business / change date

Income by type: wages / business fees / dividends / interest / other

Tax-home and state-ties questions: business base / home / family / prior state

Send Chip a short inquiry

fileabroad.com/intake

Your records and open questions

Attach a separate travel log or income list if you need more space.

This organizer is not a tax calculation or a determination of FEIE eligibility.

Foreign account inventory: nickname / country / ownership or authority / records

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Records available: returns / income statements / expenses / travel / foreign taxes

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Missing records: item / who can provide it / next action / follow-up date

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Questions: FEIE tests / self-employment tax / foreign tax / state or entity issues

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☐ I have kept immigration status separate from U.S. tax conclusions.

☐ I will send tax records only through the agreed secure intake.

Sources: IRS Publication 54; IRS foreign earned income exclusion and FBAR guidance.

Full source links are in the companion website draft and research register.

Prepared September 20, 2026. Recheck the rules for the relevant tax year.

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