

BARRON'S INTERNATIONAL TAX SERVICE

2026 U.S. Expatriate Income Tax Organizer

Personal & Household

Taxpayer and spouse

Full legal names, preferred contact details, tax year, current country of residence

☐ Yes ☐ No ☐ Attached Notes: _____

Filing status and family

Marital status; spouse citizenship/residency; dependents and birth years

☐ Yes ☐ No ☐ Attached Notes: _____

Residency and travel

Countries lived/worked in; dates of U.S. visits; any move during 2026

☐ Yes ☐ No ☐ Attached Notes: _____

Changes this year

Marriage/divorce, children, home purchase/sale, new accounts or entities

☐ Yes ☐ No ☐ Attached Notes: _____

Documents to attach

2025 U.S. return (if new client), IRS notices, relevant ID updates

☐ Yes ☐ No ☐ Attached Notes: _____

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Work, Housing & Retirement

Employment

Employer/country, wages, bonuses, benefits, foreign withholding; attach wage statements

☐ Yes ☐ No ☐ Attached Notes: _____

Self-employment

Type of work, gross receipts, expenses, business country and ownership

☐ Yes ☐ No ☐ Attached Notes: _____

Foreign housing

Rent, utilities, employer reimbursements, housing location and dates

☐ Yes ☐ No ☐ Attached Notes: _____

Retirement and other income

Pensions, annuities, Social Security, rental income and other sources

☐ Yes ☐ No ☐ Attached Notes: _____

Foreign taxes

Income taxes paid/accrued by country and income category; supporting records

☐ Yes ☐ No ☐ Attached Notes: _____

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Investments & Assets

Interest and dividends

U.S. and foreign statements; foreign tax withheld

☐ Yes ☐ No ☐ Attached Notes: _____

Sales and capital gains

Broker statements, acquisition costs, sales and carryovers

☐ Yes ☐ No ☐ Attached Notes: _____

Foreign funds and ETFs

Any non-U.S.-domiciled mutual funds or ETFs? Provide names and statements

☐ Yes ☐ No ☐ Attached Notes: _____

Property

Rental real estate, sales of homes or other assets, depreciation records

☐ Yes ☐ No ☐ Attached Notes: _____

Other items

Cryptocurrency/digital asset transactions, partnership/trust K-1s

☐ Yes ☐ No ☐ Attached Notes: _____

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International Information Reporting

FBAR / FinCEN 114

Any foreign financial accounts? List institutions, countries, account types and maximum values

☐ Yes ☐ No ☐ Attached Notes: _____

FATCA / Form 8938

Foreign financial assets, accounts, investments and relevant ownership interests

☐ Yes ☐ No ☐ Attached Notes: _____

Foreign entities

Ownership or officer role in foreign corporations, partnerships or disregarded entities

☐ Yes ☐ No ☐ Attached Notes: _____

Trusts, gifts and inheritances

Foreign trust transactions, gifts/bequests from foreign persons, supporting documents

☐ Yes ☐ No ☐ Attached Notes: _____

Prior-year omissions

Any unfiled FBARs, information returns or IRS correspondence?

☐ Yes ☐ No ☐ Attached Notes: _____

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Deductions & Final Checklist

Deductions and credits

Charitable gifts, mortgage interest, education, childcare, medical and other applicable items

☐ Yes ☐ No ☐ Attached Notes: _____

Payments and carryovers

U.S. estimates, withholding, foreign tax credit carryovers and prior-year losses

☐ Yes ☐ No ☐ Attached Notes: _____

Health and other

U.S. health coverage forms, marketplace statements, major changes

☐ Yes ☐ No ☐ Attached Notes: _____

Attachments checklist

Income statements; bank/broker summaries; foreign tax proof; entity financials; prior return

☐ Yes ☐ No ☐ Attached Notes: _____

Additional comments

Questions, unusual transactions, deadlines, or concerns for the preparer

☐ Yes ☐ No ☐ Attached Notes: _____