

## International Tax Return Checklist

Copies of prior year U.S. Federal and State tax returns, if applicable.

Foreign Wage and Income statements in lieu of Forms W-2/1099, if an employee.

Foreign Residency documentation and list of travel dates to and from the United States.

Foreign Tax Returns or other documentation regarding foreign tax payments.

If operating a business abroad, Financial Statements and list of business assets:

Profit & Loss Statement.

Balance Sheet.

List of assets (property & equipment) purchased during the current year.

Inventory information, if applicable.

If you have bank account(s) or signature control over bank account(s) with an aggregate balance (for one or all accounts combined) of over \$10,000 during the year, fill out FBAR from under other checklist.

If you are a shareholder or officer of a foreign corporation, refer to controlled foreign corporation (CFC) questions and provide.

**Please note, this questionnaire is not a comprehensive list of all required information, and additional documentation may be required.**