

Global Tax Checklist

By Felix the TaxFox

A printable checklist for expats and digital nomads to stay tax compliant across borders.

How to Use This Checklist

This Global Tax Checklist helps you track your income, assets, and compliance obligations across multiple countries. Use it as a yearly planning tool and tick off each step as you complete it.

Track Your Income, Assets & Compliance

- ✓ Record all sources of income (employment, self-employment, investments).
- ✓ Maintain a list of assets in each country.
- ✓ Keep copies of payslips, contracts, and tax forms.
- ✓ Monitor compliance requirements for foreign bank accounts.

Know What to Report and Where

- ✓ Identify reporting obligations in your home country.
- ✓ Confirm host country tax return requirements.
- ✓ Review obligations for reporting foreign assets and income.
- ✓ Stay updated on changes to tax treaties that may impact you.

Plan Ahead for Multi-Country Tax Seasons

- ✓ Mark filing deadlines for all relevant countries.
- ✓ Coordinate record-keeping so documents are ready for both jurisdictions.
- ✓ Plan currency conversions for reporting purposes.
- ✓ Seek advice before large transactions that cross borders.

Felix's Year-End Review Tips

- ✓ Review your residency status at year-end.
- ✓ Check if your financial circumstances have changed.
- ✓ Set reminders for next year's tax deadlines.
- ✓ Store this checklist with your tax records for reference.

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