Tax checklist: Americans in the UK

Everything to gather for your U.S. and UK returns. Tick each item as you go.

U.S. documents to gather

- ☐ Passport and Social Security number (and your spouse's SSN or ITIN, if filing jointly)
- ☐ Last 2–3 years of U.S. tax returns
- ☐ U.S. W-2s, 1099s and brokerage statements
- ☐ Foreign pay slips and year-end pay or tax summaries
- ☐ Your foreign tax return or tax assessment, and proof of foreign tax paid
- ☐ The **highest balance** and year-end balance of every foreign bank, savings and investment account
- ☐ Foreign pension, retirement and fund statements
- ☐ Rental income and expenses, if you own property
- ☐ A simple travel log: days in and out of each country

UK documents to gather

- ☐ P60 for each job, and P11D if you had benefits in kind
- ☐ Your Self Assessment return or HMRC tax calculation (SA302)
- ☐ UK bank interest and dividend statements
- ☐ ISA statements (ISAs are tax-free in the UK but **taxable in the U.S.**)
- ☐ UK fund statements: UK funds are often PFICs for U.S. purposes
- ☐ Workplace and personal pension statements, including any lump sums taken
- ☐ National Insurance record, if you're self-employed

U.S. forms that may apply

- ☐ **Form 1040**: U.S. citizens and green card holders file every year, wherever they live
- ☐ **FBAR (FinCEN 114)**: if your foreign accounts together topped $10,000 at any time in the year
- ☐ **Form 8938**: living abroad, if foreign assets exceed $200,000 at year-end or $300,000 at any time (single); $400,000 / $600,000 (joint)
- ☐ **Form 2555** (foreign earned income exclusion, $132,900 for 2026) **or Form 1116** (foreign tax credit)
- ☐ **Form 8621**: for foreign mutual funds and ETFs (PFICs)
- ☐ **Form 5471**: if you own 10% or more of a foreign company
- ☐ **Form 3520**: gifts or inheritances over $100,000 from a foreign person

Key dates

U.S. tax due	April 15 (interest runs from this date)
U.S. return, living abroad	June 15, automatic 2-month extension
With Form 4868	October 15
FBAR	April 15, automatically extended to October 15
UK tax year	6 April – 5 April
Paper Self Assessment	31 October
Online Self Assessment and payment	31 January
Payments on account	31 January and 31 July

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This checklist is general information, not tax or legal advice. Thresholds and dates change; we confirm what applies to you before we file. When a deadline falls on a weekend or holiday, it moves to the next business day.