





## Hello!

Welcome to your Digital Nomad Tax Workbook. Congratulations on taking this important step in getting your taxes in order, to allow you to focus on making your digital nomad journey a success. This workbook should be used in conjunction with the US Tax for Digital Nomads course.

No matter where you are in your journey, whether you've just begun planning, or are already on the road, there's no better time than the present to make a plan for your US taxes.

With a little thought and planning, your US taxes can be organised so that they're not a source of worry or stress... you'll know they're being done correctly, and you'll know what you need to do, and when.

**Here's to your continued success!**

**Grace**

# Digital Nomad Tax Checklist

Here's your basic checklist for before you leave, and while you're on the road

- Plan for your departure date: will you qualify for a partial year's FEIE?
- Track your travel for FEIE
- Employee? File form 673 with your employer to turn off W-2 withholding
- Self employed? Track your expenses
- Self employed? Schedule your quarterly estimated payments
- Everyone: File your tax return by deadline (April 15, or June 15 if residing abroad)



... DON'T FORGET YOUR LAPTOP & PASSPORT ;)

# NOTES

Personalised notes from each of the sections

**1. Foreign Earned Income Exclusion:**

**Notes**

***Jot down action items here:***

**2. Self-Employment Tax:**

**3. State Tax:**

# NOTES

Personalised notes from each of the sections

**4. Foreign Tax / FBAR questions?**

**Notes**

***Jot down action items here:***

**5. Next steps:**

**6. Miscellaneous:**

# Digital Nomad Tax To-Do List

Expand on the checklist items with your specific action plan:

Completed?	Action item
	Mailing address: Determine which US mailing address you'll use
	State residency: Consider what your state residency will be post-departure, consult a tax professional if unclear.
	Business structure: Will you form an LLC?
	Bank account: If opening a business bank account, need to be in the US to open it
	Foreign Earned Income Exclusion: Which test will you qualify under?
	Foreign Earned Income Exclusion: Counting days for Physical Presence Test
	Self-employed: Track your expenses throughout the year
	Tax compliance: Engage a tax professional to ensure you file correctly each year!
	<i>Add additional items based on your individual circumstances:</i>

# CONSULTATION PREPARATION

Enter your notes here for any questions you have before your consultation

Topic	Notes
<b>1. Foreign Earned Income Exclusion:</b> Do you have any questions on how it will work in your case?	
<b>2. Self-Employed:</b> Do you know what business structure you'll use?	
<b>3. State Tax/Foreign Tax/FBAR:</b> Any specific questions?	
<b>4. Any other questions you'd like to discuss?</b>	