



Quick Cross-Border Financial Checklist

1. Before Moving

- ☐ Review tax opportunities available to new residents in your chosen country
- ☐ Review investment accounts
- ☐ Assess insurance coverage
- ☐ Review estate plan
- ☐ Keep US banking relationships open, or find alternative solutions

2. First Year Abroad

- ☐ Find a tax professional to help with FBAR and FATCA compliance and Local Tax Registration
- ☐ Review currency needs and find a cost-effective currency conversion solution

3. Long-Term

- ☐ Plan for retirement
- ☐ Review the structure of your investments
- ☐ Review estate and inheritance plans
- ☐ Consider repatriation planning

The Legal Stuff

Nothing in this document constitutes investment, tax or any other type of advice and should not be construed as such.

MASECO LLP is authorised and regulated by the Financial Conduct Authority for the conduct of investment business in the UK and is registered with the US Securities and Exchange Commission as a Registered Investment Advisor.