Venari Wealth

Moving back to the UK?
A financial checklist

Use this page to gather the dates and statements that will help you decide what to deal with first.

☐ Dates and tax records

Note when you left and returned to the UK, where you lived and any big payments or disposals. Keep records of any overseas tax paid. Ask a tax adviser what applies to your circumstances.

☐ Pensions and investments

List each provider, country, balance and currency. Gather recent statements and purchase records. Ask what you can still access from the UK, what it costs and when payments could start.

☐ Money you need in pounds

Write down spending and one-off costs due in the next 12 months. Check what cash you can already access in the UK. If you're relying on money held abroad, check timing, fees and exchange-rate exposure.

☐ Retirement income

Find out when each pension could pay and how much. Check your UK State Pension forecast and National Insurance record. Ask about existing benefits and costs before considering any transfer.

What's the first decision you need to make?

Read the full guide at venariwealth.com/uk-return-financial-checklist

General information. Tax treatment depends on your circumstances and may change. Investments can fall as well as rise and you may get back less than you invest. Venari Wealth Ltd is authorised and regulated by the Financial Conduct Authority (FRN 1025179).