DEMOCRATS ABROAD
United Kingdom

DAUK TAX DAY

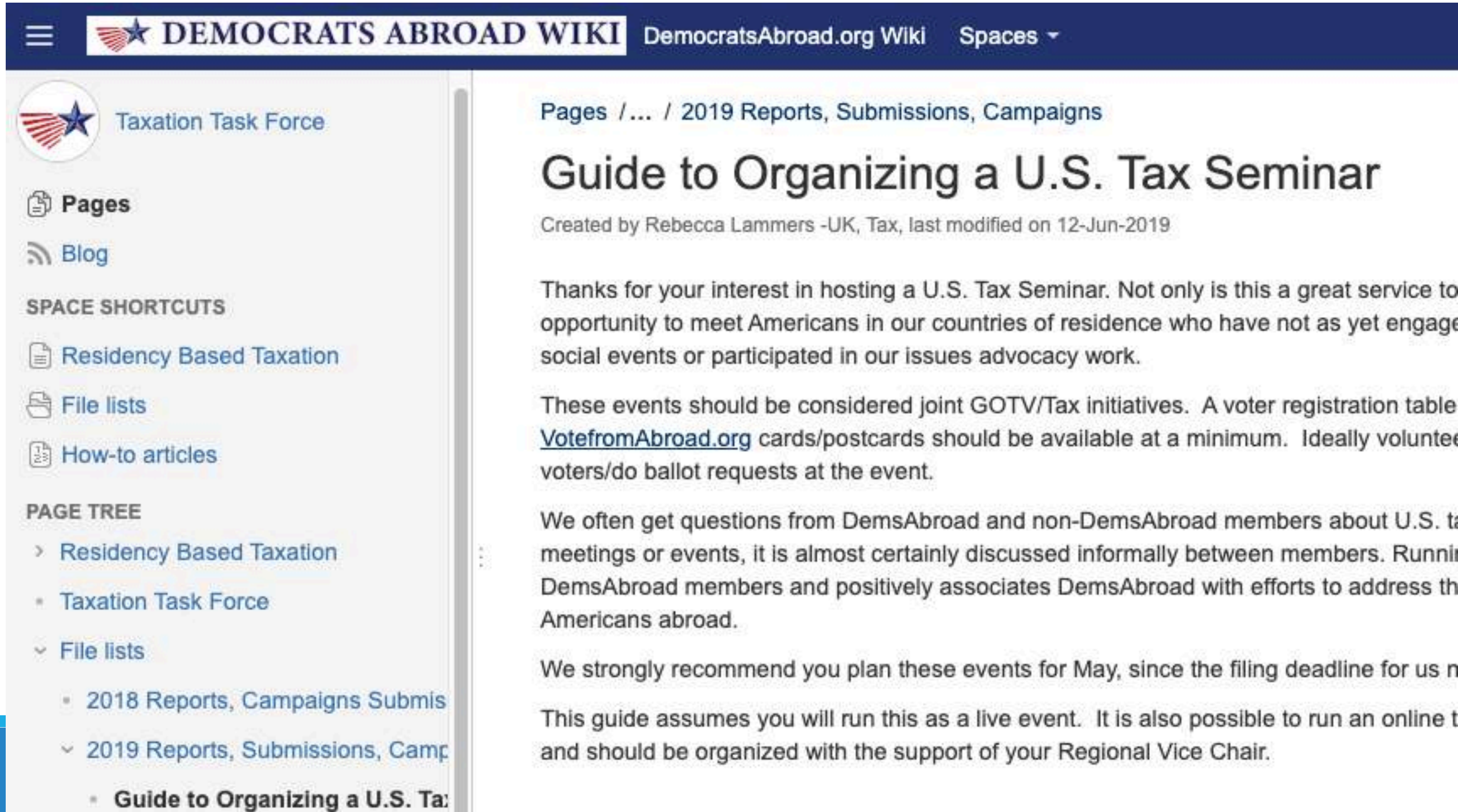
LEARNINGS

What did we do?

Hosted a day long event last Saturday with 7 panel sessions, 17 guest speakers, and over 200 Americans/DAUK members.

For Logistics

Go to DA Wiki and search for "Guide to Organizing a U.S. Tax Seminar" for more info.



What was the political message of the event?

#1 Vote

#2 Contact your members of congress to raise awareness of the tax discrimination you personally face as an American abroad

Question

If you are non-compliant (haven't filed your US federal tax return with the IRS) and you register to vote, could you be red flagged by the IRS?

No!

You have no excuse not to vote!

Question

If you vote down ballot (for state and local elections, not just federal elections) could you be liable for state tax?

No!

You have no excuse not to vote down ballot!

Question

I have never lived in the US, but I’m a US citizen. Can I vote in US elections?

Yes!

You have no excuse not to vote!

Question

I’ve heard in the news that Americans are having their passports revoked if they haven’t paid the IRS tax due. Is my passport going to be revoked the next time I go to renew my passport?

Only if you owe over $52,000 in tax.

How many people did we have register to vote?

How did I choose and vet speakers?

- Word of mouth recommendations
- US accountants/investors attending other DAUK events
- They contacted me asking to be a speaker
- Ask other speakers if they had recommendations
- Local American expat magazines/websites/Facebook groups/forums

Did participants ask specific questions about their own situation? And did they receive specific answers?

- Better to vet questions in advance than to allow a Q&A
- Helps avoid people sharing personal information in a room full of strangers
- Helps saves them the embarrassment of asking personal/embarrassing questions
- Helps to avoid repeating information and to cover more info in the session

Did you distribute panelist contact information and did we let them give out business cards?

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Speakers

Charles Bruce, Legal Counsel @ American Citizens Abroad

Charles is an American attorney specializing in international tax planning, withholding tax regimes and compliance matters. Charles served as Tax Counsel at the United States Senate Finance Committee, Vice-Chair of the American Bar Association, Section of Taxation, Committee on Foreign Activities of U.S. Taxpayers, Chair of the ABA Task Force on International Trusts of that Committee, Visiting Professor, Law Faculty, Institut für Ausländisches und Internationales Finanz-und Steuerwesen, Hamburg University, Hamburg, and Adjunct Professor of Law, Graduate Law Program, Georgetown University Law Center, Washington, DC. He is a member of the American Bar Association, International Bar Association, International Fiscal Association (US and UK branches), the Society of Trust and Estate Practitioners, and the International Tax Planning Association. He is Of Counsel to Bonnard Lawson-Lausanne and divides his time between Washington, DC and London.

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David Costello, Financial Advisor Partner @Tanager Wealth Management

David came to the UK as a trailing spouse having been a financial advisor for 13 years in Boston. In addition to a liking for Boston sports teams, David is an experienced financial planner who has quickly grasped the issues that follow American expats in the UK face. David specializes in building financial plans for UK-based households that include US taxpayers and leads the Tanager Financial Planning Team.

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Brian Dunhill, International Financial Advisor @ Dunhill Financial

Brian is a Financial Planner that constructs portfolios for clients at Dunhill Financial. Past positions have led him to work in many capacities for prestigious firms on Wall Street including UBS, Lehman Brothers, and A.G. Edwards. Brian received his Bachelor of Science in Finance with an International Business Background at the University of Central Florida and his Master in Business Administration from the Masagung School at the University of San Francisco. He has also received the Accredited Asset Management Certification from the College for Financial Planning and has sat for the Series 7,9,10,66 and insurance licenses in California and Florida. Brian is the former President of the American Club of Brussels, sits on the board of the Sharkey Foundation and is on the Advisory Committee of the American Citizens Abroad. He speaks English and French.

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Gillian Everall, Managing Director and Head of Private Client Tax Services @ Everfair Tax

Serving most recently at Frank Hirth plc as an Associate Director in the Private Client Group, Gillian has spent the last 15 years working with high net worth individuals advising across a broad range of tax issues. Gillian has specialized in dealing with clients principally in the international arena, advising on all the practical aspects of their UK taxation position such as their status under the new statutory residence test, their position under double taxation agreements, implementing pre arrival planning for the structuring of assets and creation of capital including ensuring that the planning is appropriately disclosed to HMRC, establishing an individual's domicile with HMRC and planning for remittances.

Gillian has also been involved advising clients on tax efficient estate structuring including the use of trusts for planning for Inheritance Tax and Capital Gains Tax purposes.

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Speakers

Nathalie Goldstein, Enrolled Agent, CEO @ MyExpatTaxes

Nathalie is the co-founder and CEO of MyExpatTaxes.com - the only tax software designed specifically for U.S. Expats offering the Federal, FATCA and FBAR Forms for a flat rate of 149 euro incl. VAT. MyExpatTaxes' user-friendly tax software enables American expats to prepare U.S. tax returns in as little as 30 minutes. The software makes it straightforward for expats to stay tax compliant and save Aside from the foreign earned income exclusion, MyExpatTaxes supports most expat tax situations ranging from foreign tax credits, PFICs, pensions and social security benefits, and more. MyExpatTaxes' software can also help US expats easily catch up on their US taxes through the Streamlined Filing Compliance Procedure, which is still offered at the flat rate of 149 euro/year. Moving abroad is hard enough; we make sure your taxes are not.

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Jeffrey Gould, Director @ Frank Hirth

Jeffrey brings a wealth of technical expertise and experience to the firm, having practiced in the US international tax world for over 30 years. Jeff was born and educated in Southern California and after earning his Juris Doctor (JD) degree at Harvard Law School in 1974; he commenced practicing law as a tax specialist in Los Angeles before relocating to the UK in 1978. Jeff has had a close professional relationship with Frank Hirth throughout his time in the UK and joined the firm in 2009. He has added significantly to capabilities in all areas of US and UK international corporate/commercial, income, estate and gift tax planning and in the conduct of US tax examinations and appeals. Jeff is a member of the State Bar of California. He also sits on the Tax Technical Team within Frank Hirth whose primary role is to provide technical support to the wider firm.

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Kristopher Heck, Managing Partner @ Tanager Wealth Management

Kris came to the UK in 2007 with one of the world's largest asset management companies. Having experienced many of the challenges faced by American expats in the UK, he decided that he wanted to help other expats solve those problems. He set up Tanager in 2012 to do just that and, as CIO, utilizes his extensive investment experience and knowledge to help structure clients' portfolios to maximize US/UK tax efficiency.

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Neil Kearney, President @ AARO

Neil is a native of San Diego, California. He is a member of the California and Paris Bars, a graduate of Yale and UC Berkeley Law School, and the head of his own cabinet specialized in international construction arbitration. Since 2016 Neil has been the president of the Association of Americans Resident Overseas (AARO.org). Based in Paris, but with a worldwide membership, AARO is a non-profit, non-partisan volunteer group whose slogan is "Americans Helping Americans Abroad".

In June of 2019 AARO teamed up with the Federation of American Women Clubs Overseas (FAWCO) for "Overseas Americans Week" in Washington D.C. Over eighty meetings were held in the offices of House and Senate members, government Agencies, and institutions. Prior to moving to Paris, Neil lived in San Francisco, and he votes in Nancy Pelosi's district. He paid a visit to Ms. Pelosi's district offices in July in order to advocate for Americans overseas.

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What worked well?

- Food!
- Having a voter reg table
- Allowing attendees to go up to and speak to speakers one-to-one after the sessions
- Having separate sessions on Expat Tax 101, Retirement Planning, Financial Planning 101, self-Employment, Financial Planning 201, and Social Security and Tax Advocacy.

What worked well?

- Start selling tickets early, was able to promote the event and get into a few American expat websites and Facebook groups
- Video the sessions and sell them afterwards to make extra $£€
- Asking people to join the mailing list who said they couldn't attend for next time
- Feedback forms
- Increased awareness of DA's tax advocacy efforts

What will we change for next time?

- In-person events are great if you have a big population in one city, but a lot of work
- Run webinars spread out over the year, they're easier to do and more profitable
- Ask presenters to do presentations – everyone wanted the slides from the first presentation and people even said they would have paid for it!
- Educate everyone involved on how to communicate about the event. Eg. Do not call it a workshop, advice, etc.

THANK YOU!

Email for questions:

taxcom@democratsabroad.org.uk

Go to DA Wiki and search for “Guide to Organizing a U.S. Tax Seminar” for more info.