



Tax Advocacy and Activism

DEMOCRATS ABROAD 2017 GLOBAL MEETING
ARLINGTON, VA

Moving from Advocacy to Activism

In 2011 Democrats Abroad formed the FBAR/FATCA Task Force to examine the impact of the Foreign Account Tax Compliance Act on Americans abroad and advocate for reforms to it and to the Report of Foreign Bank and Financial Accounts (FBAR).

We later formed tax -based task forces to advocate for Residency Based Taxation and the Taxation and Regulation of Investment and Retirement Savings.

GOP control of Congress and the White House has changed our ability to advocate.

Comprehensive tax reform provides an opportunity for grassroots tax activism.



Taxation Task Force

The three tax advocacy task forces are being rolled into one.

The new task force will put focus on Residency Based Taxation (RBT) grassroots activism and, secondarily, activism in support of the H.R. 2136, the Overseas Americans Financial Access Act (which would codify the Same Country Safe Harbor Exemption from FATCA reporting for Americans abroad in the Internal Revenue Code.)

We continue to follow legislative, regulatory and judicial developments in the areas of taxation and financial account disclosure of Americans abroad and report out to Democrats Abroad leaders and members.

We continue to respond to opportunities to make Congressional submissions and presentations in support of RBT and H.R.2136.

The Terms of Reference for the Tax Advocacy Task Force is in draft form and will be published shortly.



Democrats Abroad Support for Residency Based Taxation

Platform: Support for Residency Based Taxation has been in the platforms published by Democrats Abroad for decades (at least 1996)

Door Knocks: We have spoken to Congress about Residency Based Taxation at our Congressional Door Knocks.

Political Will: Whilst we have our sponsors in the Congress, including the Americans Abroad Caucus, our discussions on the Hill over the years have demonstrated no political will for Residency Based Taxation.

Comprehensive Tax Reform: Now that the GOP –led Congress has made corporate and personal tax reform a legislative priority we believe there is a genuine opportunity for us to push hard for Residency Based Taxation.

Grassroots Activism: we must strongly amplify to Congress the need for and importance of Residency Based Taxation



RBT Grassroots Activism

We need to urgently send a clear and loud message to as many Senators and Representatives as possible about the importance of their support for Residency Based Taxation in the upcoming tax package.

- RBT Campaign In A Box
- **RBT Congressional Call Storm – Thursday 15 June**
- RBT FAQs – in draft form; will be published soon.
- Collaboration with our colleague organisations representing Americans Abroad (American Citizens Abroad, Association of Americans Residing Overseas and Federation of American Womens Clubs Overseas)
- ACA – Revenue estimation project

RBT Campaign In A Box

Includes -

- Background information about Residency Based Taxation and our support for it
- Campaign and social media messaging
- “How to find your member of Congress”
- Participating in the RBT Congressional Call Storm
- Script for calls to Congress
- Sample language for postcard and letter writing
- Democracy.io email campaign (lets us track the number of emails sent)



Thank you for your support

Please contact us at any time with questions:

Taxation Task Force

Carmelan Polce, Chair (Singapore)

DeeDee Gierow (Sweden)

Michael Ramos (Australia)

Joe Smallhoover (France)

Orlando Vidal, ex-officio (UAE)





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