

# GUIDE TO ORGANISING A U.S. TAX SEMINAR

March 2018

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# Introduction

Thanks for your interest in hosting a U.S. Tax Seminar. Not only is this a great service to provide our members but it also gives us an opportunity to meet Americans in our countries of residence who have not as yet engaged with our voter outreach volunteers, attended our social events or participated in our issues advocacy work.

These events should be considered joint GOTV/Tax initiatives. A voter registration table at the event is absolutely essential. [VotefromAbroad.org](http://VotefromAbroad.org) cards/postcards should be available at a minimum. Ideally volunteers will have notebook computers online to register voters/do ballot requests at the event.

We often get questions from DemsAbroad and non-DemsAbroad members about US tax filing obligations. If it's not directly addressed in meetings or events, it is almost certainly discussed informally between members. Running a tax seminar recognizes the needs of DemsAbroad members and positively associates DemsAbroad to address the issues and challenges of our membership.

**We strongly recommend you plan these events for May**, since the filing deadline for non-resident taxpayers, like us, is 15 June.

This guide assumes you will run this as a live event. It is also possible to run an online tax webinar, but these will be organized across regions and should be organized with the support of your Regional Vice Chair.

# Benefits

## To Country Committees/Local Chapters

- Connecting with members not inclined to attend our social or political gatherings
- Opportunity for member verification
- Another benefit of DemsAbroad membership (we receive a tremendous amount of positive feedback)
- Attendance by non-DemsAbroad member Americans helps us expand our membership and voting outreach
- Potential fundraiser for CC
- Opportunity to help attendees register to voter/request ballots

## To members

- Gain access to much needed information
- Ability to ask questions relevant to their situation
- Access to information without cost
- Receive presentation slides
- Register to vote/request a ballot for the midterm elections

# Event planning

- **Date:** we recommend May, in advance of the 15 June filing deadline for non-resident taxpayers
- **Time:** we suggest evening, though sessions (see next slide) that are oriented towards retirees might be best scheduled for the daytime.
- **Place:** we suggest -
  - a quiet meeting room that enables participants to sit comfortably, hear the presenter and see presentation slides,
  - facilities that enable the presenter to refer to slides or handouts, and
  - amenities for the “host” to run a question and answer period using a microphone so that everyone hears the questions as well as the answers.

# The agenda

You may decide to do a tax seminar as a one-off event or do a series of seminars on different tax topics for Americans abroad. Topics can include:

- Tax Filing Requirements
- Estate Planning
- Retirement Planning
- Investment Planning and Management
- Tax Planning Between the US and your country of residency
- Self-Employment
- Operating A Controlled Foreign Corporation
- Information for retirees

These topic suggestions aren't exhaustive. There might be a particular topic that is of most interest to members in your country. We recommend that you start with a topic that will draw the most members to attend.

# Engaging a presenter

Some Country Committees – indeed some regions – have existing relationships with tax return preparers who can present. In engaging a seminar presenter please first consult with your Regional Vice Chair, as this could save you a lot of effort.

Engaging a tax return preparer to make the presentation can be tricky. We should not offer them any compensation (though a thank you gift is not inappropriate) in exchange for their participation. They should welcome the opportunity to present their knowledge to a group of potential clients.

Selecting a single preparer might be difficult, as it may suggest we are showing favoritism for one commercial entity over another. You may need to give consideration to organizing an agenda that features presentations by more than one agency, each tackling a different topic.

To find a presenter you should ask around for a referral to a local tax return preparer with U.S. filing experience and expertise. If that does not yield a suitable presenter we strongly recommend the Tax Return Preparer Directory published by American Citizens Abroad. <http://www.acareturnpreparerdirectory.com>. On this site you will likely find a selection of U.S. tax professionals - unless you are in a particularly remote area. In that instance it may make more sense to participate in a regional tax webinar.

# Promoting the event

- Post the event on your DA webpage; include an RSVP on the event page.
- Use Nation Builder to send a blast email to members with a link to the event on the webpage (so they can RSVP)
- Promote on relevant American ExPat meet up, Facebook groups, other social media, English language bookshops, American and International School bulletin boards, etc.
- Message other DemsAbroad country committee or local chapter leaders in the area who may have members who can attend the event (and who will join you in promoting the seminar to DemsAbroad and non-DemsAbroad members).
- Ask the presenter to promote the seminar on their website or other
- PLEASE NOTE:
  1. RSVPs are essential! There may be a great deal of demand for the information and the seminar/webinar capacity may be exhausted faster than expected.
  2. You should announce the names/companies of the presenters but refrain, of course, from overtly advertising their services.



# Staging the seminar

- Post signage outside and inside the venue directing attendees to the seminar room
- Consider providing water, coffee, tea - or having the seminar nearby to a coffee shop so attendees can get their own. You might also invite attendees to gather at a coffee shop or pub afterwards.
- The DA member hosting the event should –
  - welcome all (members and not members) on behalf of DA and the Country Committee/Local chapter;
  - deal with any "housekeeping" matters (bathrooms, emergency exits, etc);
  - introduce guest presenter(s);
  - run the Question & Answer Session;
  - introduce the Voter Registration team/table;
  - recap the DemsAbroad Tax Advocacy work (see Slide 12); and
  - end with announcements about upcoming events.
  - thank attendees.

continued ...

# Staging the seminar, cont

- Prepare and distribute a feedback form asking attendees to comment on: the date, time, place of the event; the format of the presentation; the content; the presenter. You can also ask about whether they regularly attend DA events, would they attend another, do they know about DA's tax advocacy work, have they participated in any of our grassroots tax reform campaigns by calling, messaging or writing to their elected representatives.
- Invite your voter registration representative to say a few words about the voter registration table at the venue and to strongly urge attendees not to leave before registering to vote/requesting a ballot for the 2018 midterm elections.
- Make the comments on the following page about DA's tax advocacy work and invite them to send tax advocacy questions to [taxationtf@democratsabroad.org](mailto:taxationtf@democratsabroad.org).
- Have a copy of the March 2018 Tax Reform Door Knock "Leave-behind pack" and invite attendees to download one from the Taxation page of the DA website.
- Consider inviting attendees to gather at a coffee shop or pub afterwards. Put this on the invitation or announce casually at the end of the seminar.

# Democrats Abroad Tax Advocacy Work

We are asking Congress to:

1. Enact a switch from Citizenship Based Taxation to Residency Based Taxation.
2. Pass the HR 2136, the “Overseas Financial Access Act” – to eliminate the foreign financial accounts of Americans living abroad from reporting under Foreign Account Tax Compliance Act (FATCA).
3. Pass the HR 1205, the “Social Security Fairness Act” - to repeal the Windfall Elimination Provision that prevents Americans abroad with pensions in their countries of residence from claiming the full amount of Social Security payments owed to them.

We recommend that Congress:

- Hold hearings to investigate the myriad ways the U.S. tax code discriminates against Americans abroad and build support for the three critical changes above.
  - Pass HR 2710 - to establish a Commission to study the impact of federal laws and regulations on Americans living abroad and to avoid passing laws that inadvertently harm Americans abroad in the future.
  - Enact reforms to the Foreign Bank and Financial Accounts Report (FBAR) reporting requirement for U.S. citizens in their bona fide country of residence, especially to redress the enormous and out-of-proportion penalties for non-wilful non-compliance.
- continued ...

# Democrats Abroad Tax Advocacy Work, cont

We urge Congress to:

- Fix the flaws in the Tax Cuts and Jobs Act. It imposes two new "transition taxes" on offshore businesses owned by Americans abroad that will destroy the viability of many of them.\*
- Join the Americans Abroad Caucus
- Contact us when they travel to our countries of residence so that we can meet them.

\* See the Taxation page of the DemsAbroad website for our current campaign demanding relief for American business owners abroad from the Repatriation Tax and the GILTI tax, both built into the 2017 Tax Cuts and Jobs Act.

# Key Contacts

## Questions about:

DA website postings - DA Intl Secretary Jeffrey Cheng [secretary@democratsabroad.org](mailto:secretary@democratsabroad.org)

Sending blast emails - Gail Fagen of DA IT Team [it\\_help@democratsabroad.org](mailto:it_help@democratsabroad.org)

Engaging with the tax presenter - DA legal counsel Tom Schmid [counsel@democratsabroad.org](mailto:counsel@democratsabroad.org)

Get Out The Vote/Voter Registration - GOTV Coordinator Heidi Burch [heidib@democratsabroad.org](mailto:heidib@democratsabroad.org)

Tax advocacy questions - Taxation Task Force Chair Carmelan Polce - [taxationtf@democratsabroad.org](mailto:taxationtf@democratsabroad.org)

If you are interested in participating in a multi-chapter or multi-country/regional tax webinar please contact your Regional Vice Chair:

Americas region - Jody Quinnell - [rvc-Americas@democratsabroad.org](mailto:rvc-Americas@democratsabroad.org)

Asia Pacific region - Kat Alikian - [rvc-ap@democratsabroad.org](mailto:rvc-ap@democratsabroad.org)

EMEA region - Will Bakker - [rvc-emea@democratsabroad.org](mailto:rvc-emea@democratsabroad.org)

**The DemsAbroad Taxation Task Force and GOTV Team thank you for your support!**

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