

**Initial and Annual Expatriation Statement**  
 For calendar year 2019 or other tax year beginning \_\_\_\_\_, 2019, and ending \_\_\_\_\_, 20\_\_\_\_  
 ▶ Go to [www.irs.gov/Form8854](http://www.irs.gov/Form8854) for instructions and the latest information.  
 ▶ Please print or type.

Name \_\_\_\_\_ Identifying number (see instructions) \_\_\_\_\_

**Part I General Information.** For all filers.

- 1 Mailing address and telephone number where you can be reached after expatriation \_\_\_\_\_
- 2 Address of principal foreign residence (if different from line 1) \_\_\_\_\_
- 3 Country of tax residence (if different from line 2) \_\_\_\_\_
- 4 Check the box that applies. See instructions.
  - Initial expatriation statement for persons who expatriated in 2019. Complete Part II.
  - Annual expatriation statement for persons who expatriated before 2019. Complete Part III.
- 5 Date of expatriation under section 877A(g)(3) for expatriating citizens and long-term residents. See instructions.
  - Citizen \_\_\_\_\_
  - Long-term resident \_\_\_\_\_
  - Long-term resident with dual residency in a treaty country. Date commencing to be treated, for tax purposes, as a resident of the treaty country \_\_\_\_\_
- 6 List all countries (other than the United States) of which you are a citizen.
  - a Name of country \_\_\_\_\_
  - b Date you became a citizen of each country listed in line 6a \_\_\_\_\_
- 7 How you became a U.S. citizen:  By birth  By naturalization
- 8 Date you became a U.S. lawful permanent resident \_\_\_\_\_

**Part II Initial Expatriation Statement for Persons Who Expatriated in 2019**

**Section A Expatriation Information**

- 1 Enter your U.S. income tax liability (after foreign tax credits) for the 5 tax years ending before the date of expatriation.
 

1st Year	2nd Year	3rd Year	4th Year	5th Year
Before Expatriation	Before Expatriation	Before Expatriation	Before Expatriation	Before Expatriation
\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
- 2 Enter your net worth on the date of your expatriation for tax purposes . . . . . \$ \_\_\_\_\_
- 3 Did you become at birth a U.S. citizen and a citizen of another country, and do you continue to be a citizen of, and taxed as a resident of, that other country? . . . . .  Yes  No
- 4 If you answered "Yes" to question 3, have you been a resident of the United States for not more than 10 of the last 15 tax years? . . . . .  Yes  No
- 5 Were you under age 18 ½ on the date you expatriated and have you been a U.S. resident for not more than 10 years? . . . . .  Yes  No
- 6 Do you certify under penalties of perjury that you have complied with all of your tax obligations for the 5 preceding tax years? See instructions . . . . .  Yes  No