NOMAD CAPITALIST®

CLIENT CASE STUDY

# From a U.S.-only life to a *second passport*

## THE CLIENT

Jerry Massey, 44, a U.S. citizen living in the United States. He worked in human resources at a major insurance company and as a college sports broadcaster, and had built his wealth through crypto and precious metals.

## WHAT HE WANTED

- A second passport or residence.
- Bank accounts outside the United States.
- The option to live abroad long term.

## WHAT ELSE HAD TO BE CONSIDERED

As a U.S. citizen, he faced limits on banking and investing abroad, and U.S. tax filing and reporting that follow him wherever he lives. The plan had to work around both, and keep the option of giving up U.S. citizenship open for later.

*"My desired outcome was to wake up each morning knowing that I had options which lie outside of the borders I was born in."*

JERRY MASSEY

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# Decision to passport in *under two years*

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| **Apr–Jul 2021** | **A tailored action plan**<br>He applied, was accepted and signed within one week. Strategy and decision calls followed, and the plan was finalized. |
| **Jul–Aug 2021** | **Banking outside the U.S.**<br>One account opened in Portugal and two in Georgia, with banks that work with U.S. citizens. |
| **2021–2022** | **Dominica citizenship by investment**<br>Chosen as the fastest route to a second passport. Application started in summer 2021, approved in June 2022, passport in hand by December 2022. |
| **Next steps** | **Options for later**<br>A review of what giving up U.S. citizenship would involve, and a shortlist of countries he could live in. |

THE RESULT

A second passport, three accounts outside the U.S. and a clear plan for life abroad. Jerry is now a Nomad Capitalist brand ambassador.

*"Becoming a client at Nomad Capitalist was one of the best decisions I've ever made in my entire life."*