

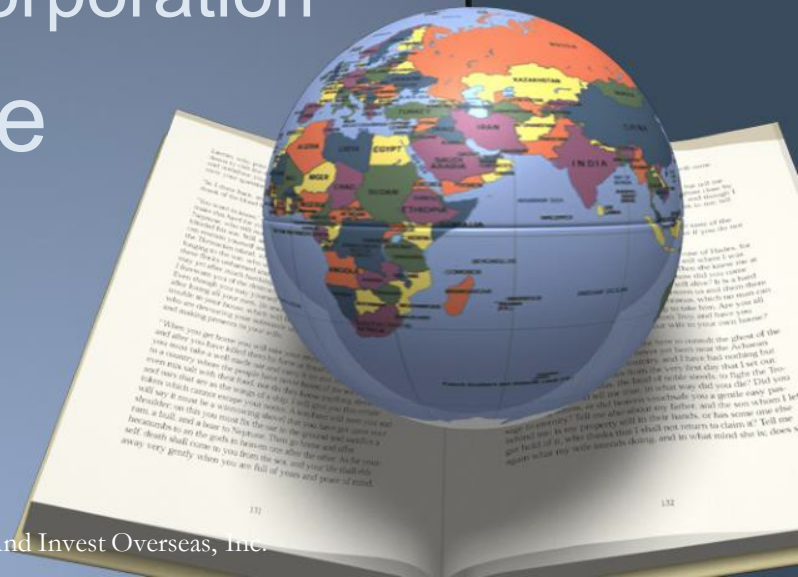
Mitigating and Managing Taxes in a Global Context

Offshore Wealth Virtual Summit – Nov. 17-20, 2020



U.S. Taxes

- FEIE
- Tax Treaties/Double Taxation
- Pensions and Social Security
- Deferred Tax - Offshore Corporation
– Gone, Gone, Gone



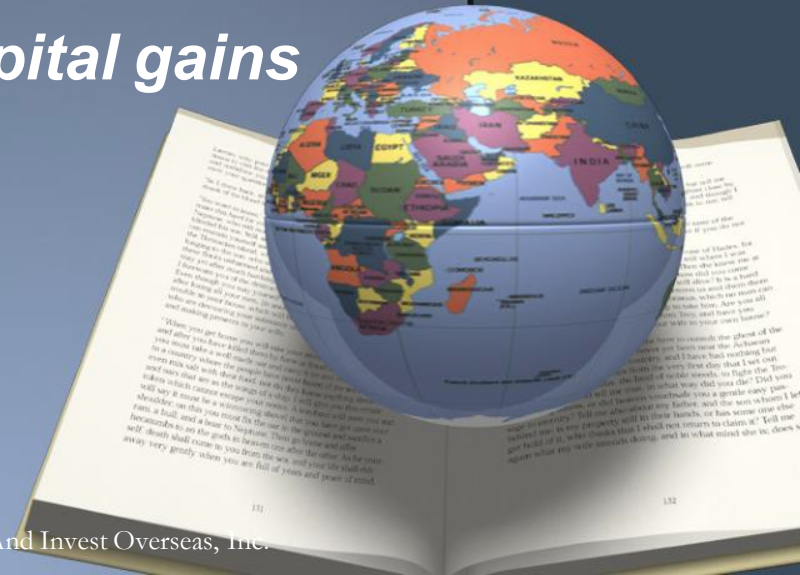
Foreign EARNED Income Exclusion in 2020 is \$107,600 per taxpayer

Earned:

- Foreign salaries and wages, bonuses and commissions earned for personal services

“Unearned” income

- *Interest*
- *Dividends*
- *Capital gains*



Foreign Taxes

Worldwide Income Taxation

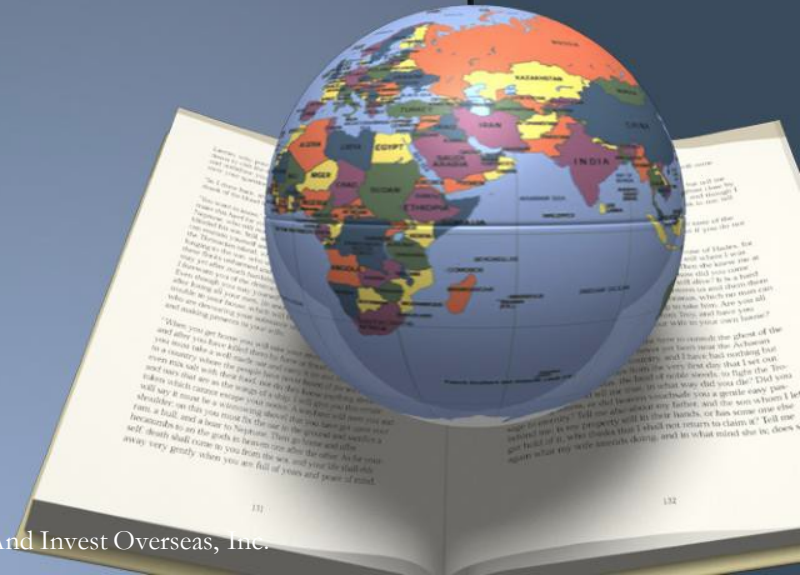
- Argentina
- Chile
- Colombia
- France
- Mexico
- Portugal (NHR Program)
- Spain



Foreign Taxes

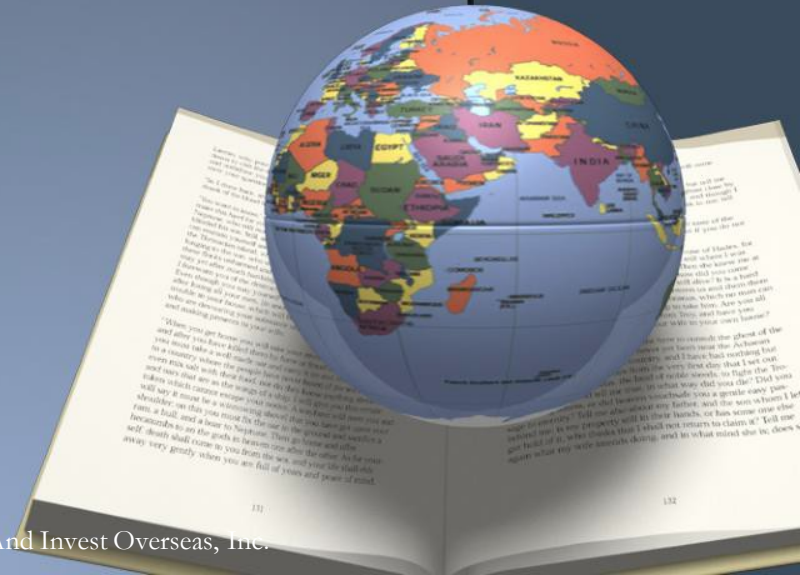
Jurisdictional Taxation

- Belize
- BVI
- Dominican Republic
- Malaysia
- Panama
- Paraguay
- Uruguay



Other Considerations

- Wealth Tax
- Inheritance Tax
- Capital Gains Tax
- Probate



Real Estate Taxes

- Transfer Tax
- Property Tax
- Income Tax on Rentals





Seek Tax Advice Before You Take Up Residency Or Invest