Mitigating and Managing Taxes in a Global Context

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

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U.S. Taxes

- FEIE
- Tax Treaties/Double Taxation
- Pensions and Social Security

Deferred Tax - Offshore Corporation
 – Gone, Gone, Gone

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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

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Real Estate Taxes

Transfer Tax
Property Tax
Income Tax on Rentals

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Seek Tax Advice **Before** You Take Up Residency Or Invest