Mitigating and Managing Taxes in a Global Context

Offshore Wealth Virtual Summit – Nov. 16-19, 2021

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U.S. Taxes

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

Deferred Tax - Offshore Corporation
 – Gone, Gone, Gone

Foreign EARNED Income Exclusion in 2022 is \$112,000 per taxpayer

Earned:

 Foreign salaries and wages, bonuses and commissions earned for personal services "Unearned" income

Interest
Dividends
Capital gains

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Triggering Tax Residency

Ways You Become A Tax Resident

- Time in country 180/183 days or more
- Center of Interest
 - Family
 - Main Home
 - Business
- Elected/Declared

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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



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