



A&M TAXAND SERVICES

PRIVATE CLIENT SERVICES – US/UK DUAL TAXATION

A&M Taxand's Private Client Services team use diverse set of skills and experience to help clients navigate the complex world of US and UK personal taxation.

US citizens resident abroad have dual taxation requirements including pre arrival and exit planning, US/UK efficient taxation, US foreign informational reporting, UK non-domicile issues, UK IHT and US Estate/Gift planning and cash flow calculations that can be analysed, addressed and explained by our team.

UK residents with US interests such as investments, property or partnership interests will need to consider reporting requirements, US withholding issues, treaty claims and foreign tax credit claims.

Our Private Client Services team, with dual qualified tax professionals, provides clients with an integrated solution to deliver proactive advice on all planning and compliance issues relating to US/UK dual taxation, saving time and maximising return on investment.

In addition, A&M Taxand has extensive expertise in all areas of US, UK and international tax through the global firm, and the Taxand network, which covers many other jurisdictions.

A&M Taxand's approach to Private Client Services

A&M Taxand's Private Client Services practice is designed to compliment and work with all your advisors. We bring clients peace of mind by collaborating, connecting on and overseeing an intricate network of internal and external expert professional advisors.

Compliance and Structuring

- US and UK tax preparation for individuals and trusts/estates
- US and UK tax preparation for US entities with US and/or foreign business activities, foreign entities with US ownership and/or business activities
- IRS and HMRC investigation advice
- US and UK multi-year filings for delinquent taxpayers including Streamlined disclosures

Changing Tax Residence

- Planning and advice for pre-immigration and expatriation
- Foreign tax credit planning
- Investment planning for inbound and outbound investments

Future Succession and Wealth Preservation

- US Estate and Gift Tax planning and compliance
- UK IHT planning and compliance
- Family Office Services, including family governance, risk mitigation, succession planning, administrative services (bill pay and administrative support)

Who do we work with?

Our clients include the following:

- US Citizen or Green Card holders in the UK
- US persons in Europe and other jurisdictions, partnered together with local partner tax firms
- UK residents with US interests, through asset management, law or other professional partnerships
- UK residents with US real property interests
- Non-US persons moving to the US
- UK non-domiciled individuals in the UK, or those moving to the UK
- US persons looking to move out of the US, abandon Green Cards or expatriate

We work with other professionals to service client needs, including:

- The wider internal A&M network
- The Taxand international network of advisors
- Family Offices
- Private Banks
- Wealth Advisors
- Investment Firms
- Family and Estate Lawyers
- Immigration Lawyers
- Trustees

Why use A&M Taxand?



One dedicated engagement team

A clear senior point of contact to ensure consistency in communication and approach throughout the engagement, with advisory and compliance together in one engagement.



Clear, joined up, holistic advice

The team's integrated offering, pulling together services from across A&M Taxand and the Taxand global network, provides clients with one-stop-shop for all US/UK dual or other international taxation advice and planning.



Client service focussed approach

A&M prides itself on putting client needs at the forefront of every engagement, providing deep expertise in key areas in a clear and timely fashion.

For more information, please contact:



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About Alvarez & Marsal Taxand

Alvarez & Marsal Taxand, an affiliate of Alvarez & Marsal (A&M), a leading global professional services firm, is an independent tax group made up of experienced tax professionals dedicated to providing customized tax advice to clients and investors across a broad range of industries. Its professionals extend A&M's commitment to offering clients a choice in advisors who are free from audit-based conflicts of interest, and bring an unyielding commitment to delivering responsive client service. A&M Taxand has offices in major metropolitan markets throughout the U.S., and serves the U.K. from its base in London.

Alvarez & Marsal Taxand is a founder of Taxand, the world's largest independent tax organization, which provides high quality, integrated tax advice worldwide. Taxand professionals, including almost 550 partners and more than 2,500 advisors in 50 countries, grasp both the fine points of tax and the broader strategic implications, helping you mitigate risk, manage your tax burden and drive the performance of your business.

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