



# TAX

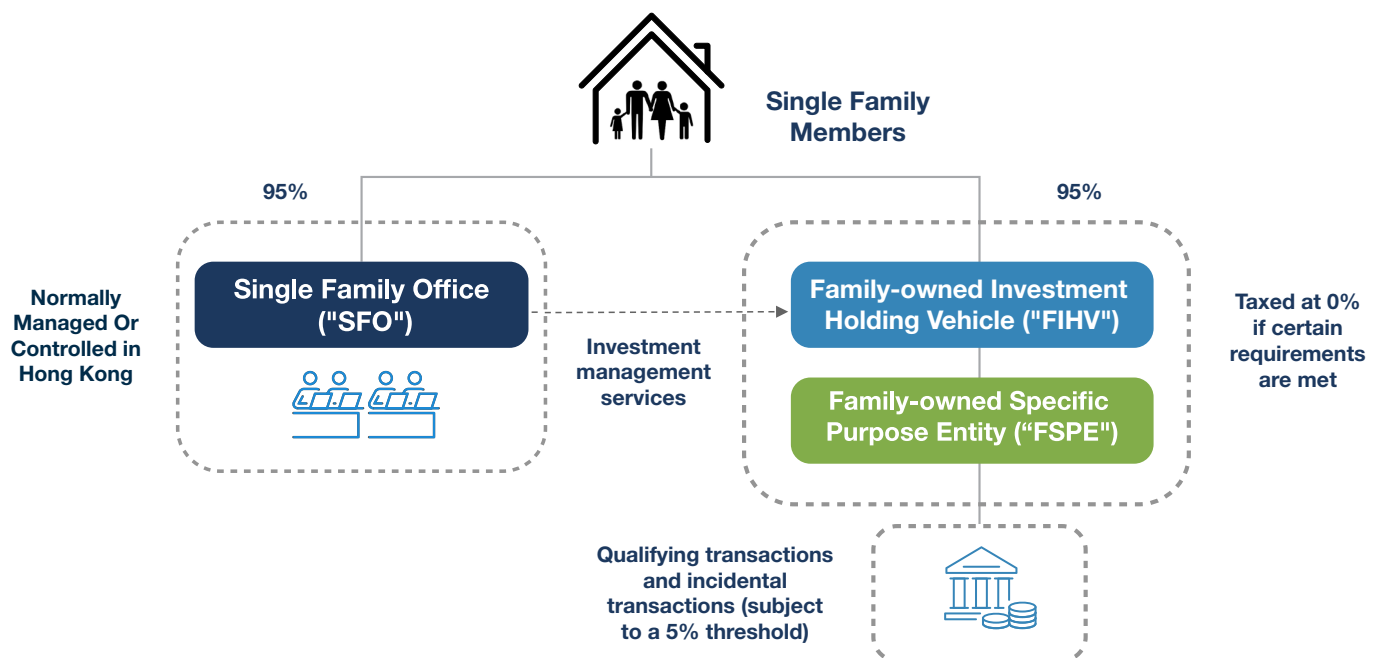
## HONG KONG SAR FAMILY OFFICE SERVICES

As competition intensifies for the position of Asia's foremost international investment destination, the Hong Kong SAR has taken proactive steps to enhance its appeal by implementing a range of tax and non-tax incentives for family offices, with the aim of attracting high net worth individuals and investment capital.

Alvarez & Marsal's Hong Kong SAR Family Office Services are dedicated to supporting these clients in managing their family wealth and minimizing the administrative costs and burden as well as potential tax costs throughout the investment life cycle. Our priority is to deliver highly personalized and bespoke solutions that are compliant, robust and flexible as the private high net worth ecosystem continues to evolve.



### Hong Kong SAR Family Office Tax Regime





## The A&M One-Stop-Shop Services

### Structure Set-Up

- Design and advise on an effective tax structure for setting up the family office in view of the client's unique profile and requirements
- Analyse the applicability for the family office tax concession
- Set up the family office and investment holding structure, including interposed trusts

### Annual Services

- Provide bookkeeping, human resource management and corporate secretarial services
- Provide annual tax compliance services and handle any enquiry from the tax authority
- Prepare supporting transfer pricing benchmarking analyses to ensure investment arrangements are in line with the requirements for the incentive



### Visa Application

- Advise on the relevant visa requirements of key personnel
- Prepare and submit the relevant visa applications to the Immigration Department

### Investment Support

- Strategize and implement tax effective structures for the proposed investments
- Perform due diligence review on proposed investment targets
- Advise on investment exit strategy and assist with exit tax filings

**A&M's integrated offering pulls together our collective expertise from across A&M and our broader network to provide clients with an all-inclusive wealth planning solution. Please contact our A&M Asia Tax team today.**

### Key Contacts



**Yvette Chan**  
Managing Director  
Hong Kong SAR  
+852 6908 2595  
[ychan@alvarezandmarsal.com](mailto:ychan@alvarezandmarsal.com)



**Eu-Kim Chan**  
Senior Director  
Hong Kong SAR  
[echan@alvarezandmarsal.com](mailto:echan@alvarezandmarsal.com)



**Ansel Yip**  
Senior Director  
Hong Kong SAR  
[ayip@alvarezandmarsal.com](mailto:ayip@alvarezandmarsal.com)



**Josephine Zhang**  
Director  
Mainland China  
[jzhang@alvarezandmarsal.com](mailto:jzhang@alvarezandmarsal.com)

### ABOUT ALVAREZ & MARSAL TAX

Alvarez & Marsal Tax, part 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 Tax has global presence in major metropolitan markets throughout the Americas, EMEA, and APAC.

Follow A&M on:



© 2024 Alvarez & Marsal Holdings, LLC.  
All Rights Reserved. 437020

To learn more, visit [AlvarezandMarsal.com](https://www.alvarezandmarsal.com).

**ALVAREZ & MARSAL TAX**