

Private Client Services

Effective Global Solutions

Now, for tomorrow

**“United by a
commitment to
provide exceptional
client service”**

About Baker Tilly International

Baker Tilly International is one of the world’s leading networks of independently owned and managed accountancy and business advisory firms united by a commitment to provide exceptional client service.

Every day, 33,600 people in over 140 territories share experiences and expertise to help privately held businesses and public interest entities meet challenges and proactively respond to opportunities. International capability and global consistency of service are central to the way we work.

For more information visit bakertilly.global.

The Baker Tilly International approach

Our holistic approach enables us to service every one of our client's financial needs.

Our private client services teams are specialists in all aspects of personal tax, bringing to each client assignment a thorough knowledge of tax law and practice in their jurisdiction, extensive experience of guiding individuals and their family businesses safely through their compliance obligations, and a proactive approach to giving constructive advice to businesses regarding tax opportunities and wealth structuring, including assistance with planning for wills and inheritance.

How does Baker Tilly International think differently?

Our one stop shop service structure enables us to guide clients to customised personal tax planning solutions that extend far beyond the expected.

Bespoke

None of our personal tax planning services are off the shelf. We heed your personal circumstances and create bespoke planning for you.

Specialist

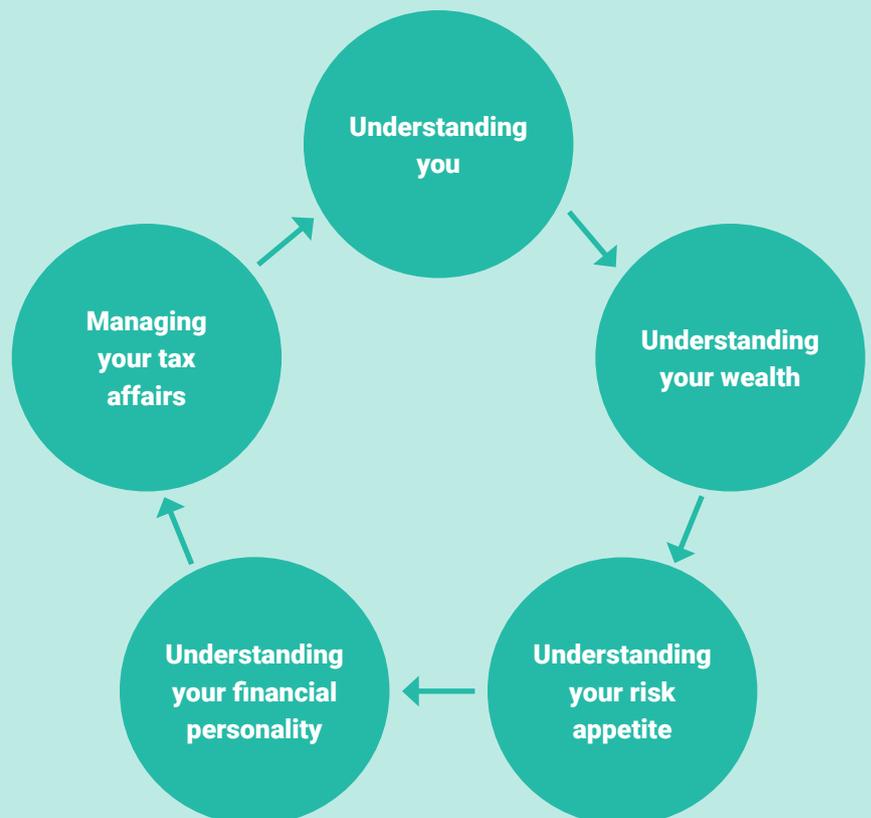
We have highly qualified teams with experts in all areas of personal tax planning.

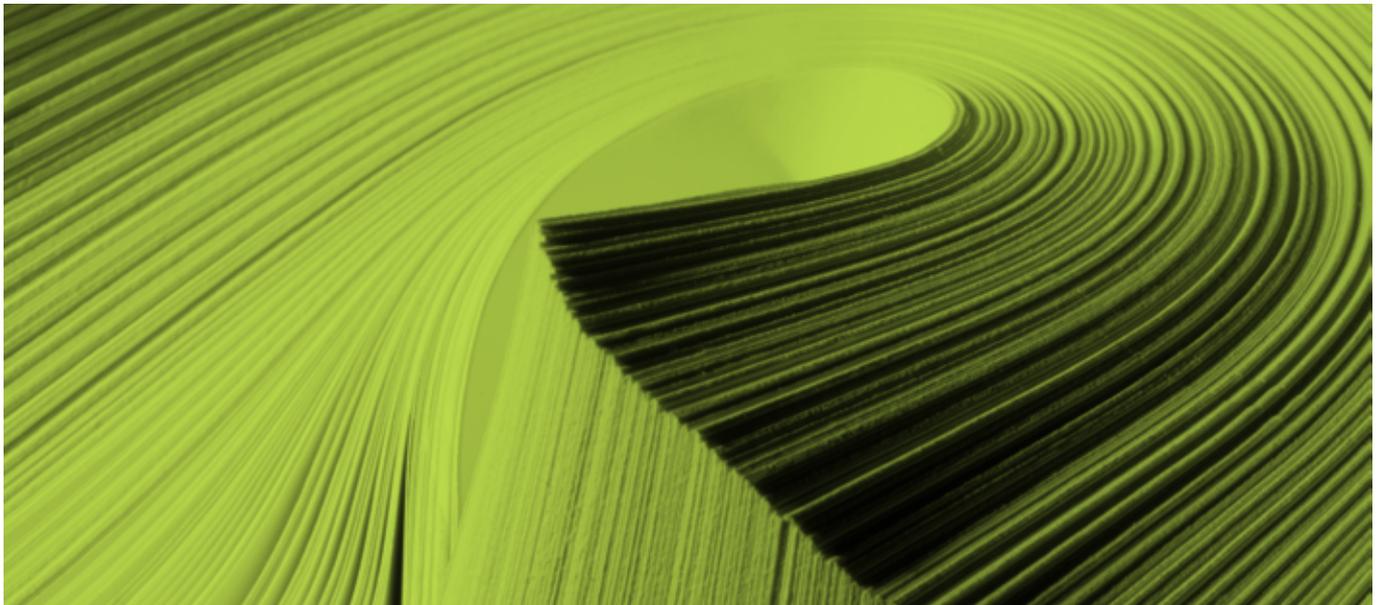
Holistic

We are a one-stop shop for all services you may require whether it is investment advice, pensions advice or financial planning.

Comprehensive

We do not promote, and have not promoted, aggressive or abusive tax planning arrangements. This ensures your reputation is protected in an environment of greater scrutiny from tax authorities.





Your private client team – A key relationship

Many individuals' tax positions are complex due to increasingly complex legislation and the desire of many governments to clamp down on what may be seen as excessively generous incentives on offer for those with comfortable financial situations.

We can assist when you need advice at home or abroad. We will provide 'one point of contact', who can ensure that you comply with all tax regulations around the world, as well as liaise with the relevant specialists to ensure a holistic view of your tax affairs is taken, rather than just looking at one aspect in isolation.

We have member firms in more than 140 territories, including in all of the world's major economies. Our member firms have partners, directors and staff operating across a wide range of professional disciplines, including in the complex and challenging field of expat tax.

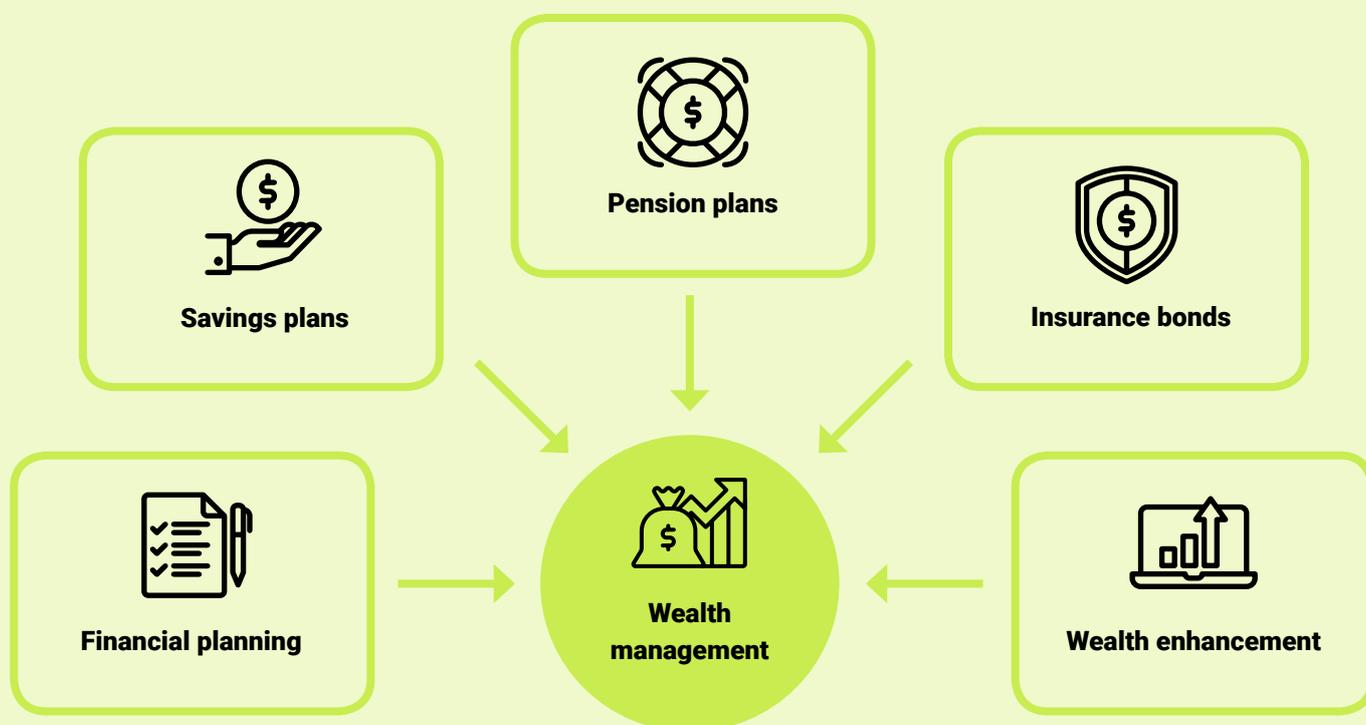
We can recommend ways to mitigate your liability to income, capital gains and inheritance tax and help you establish appropriate structures to safeguard and maintain your global wealth.		Wealth management
		Cross border tax considerations
		Retirement and business succession planning
		Estate planning

Wealth management

Great investment advice doesn't exist in a vacuum. Our service evaluates all your financial needs, from financial planning to wealth enhancement. We like to call this your total wealth solution.

There are many options for structuring wealth. Our wealth management team's overriding goal is to formulate a strategy that meets your overall objectives while simultaneously incorporating your individual tax specific objectives.

Using a combination of tax specialists and our independent wealth management consultants, we are equipped to provide a team of experts who can advise you throughout the process of:



The bespoke nature of our service means that we can accommodate a wide range of wealth levels from the perspective of assets placed under our management. Our service assists in creating wealth, building a long-term financial strategy to protect it while facilitating your desire to enjoy your wealth and have the extensive capabilities to do this on a global level.

We can look at your entire financial situation, wherever assets are held in the world, to develop a complete approach to the management and growth of your wealth whether this is for you, your family, future generations, as well as your business.

Cross border tax transaction

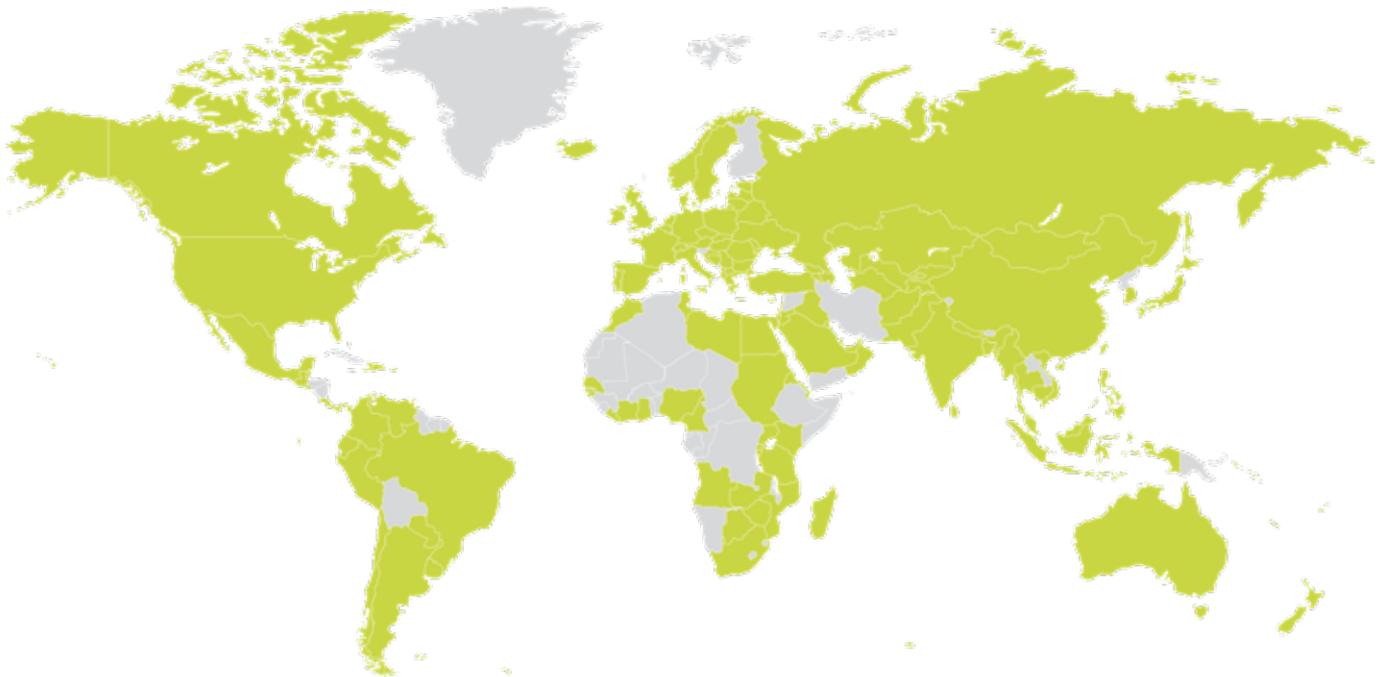
Ongoing legislative and regulatory changes, along with an increased tax authority focus on wealthy individuals and their business connections, creates a challenging global environment that demands appropriate compliance obligations.

As world markets become increasingly intertwined and individuals become more globally mobile, taxpayers need to be aware of cross-border considerations. Our all-round service extends from tax return compliance to wealth management; from setting up a trust fund for your children, to the tax implications of emigration.

We analyse individual circumstances and advise on the law and official practice, liaising with local tax authorities. Good tax advice comes from knowing the system: we don't sit back and wait for you to come to us. We proactively advise you.

It is important to have a full understanding of how movements around the world can affect your residence and domicile status: the impact of spending a certain number of days in overseas jurisdictions, of adding holiday time to a foreign work assignment.

Member firm presence: 147 territories



33,600
employees



\$US3.4 billion
revenues



794
offices



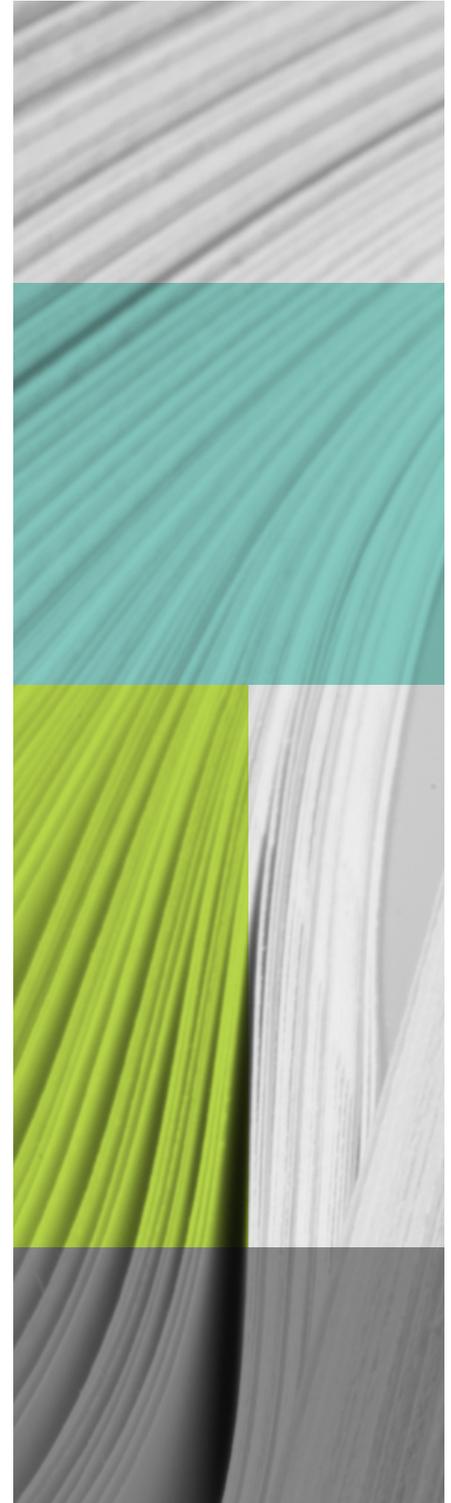
Retirement and business succession planning

Creating and implementing an effective retirement and business succession plan needs a proactive, technical and essentially commercial approach. Our tax advisory, corporate finance and business strategy teams will ensure a smooth execution of your succession plan.

A business succession plan establishes the framework for the transfer of ownership and management of a business to a chosen successor. Properly structuring a retirement and business succession requires an analysis of tax and governance considerations, as well as a deep understanding of the family's short- and long-range business and professional goals and objectives.

We tailor the delivery of our services to your individual needs to create a viable succession plan, provide for the financial independence of the retiring owners and position the business for continued success and growth. Advice can cover:

- Establishing goals and objectives
- Establishing the succession strategy
- Creating a business and owner estate plan
- Creating a transition process.



“Trusts and estate planning can be a powerful tool to protect family wealth”

Trust and estate planning

With estates that now typically span several jurisdictions and comprise an array of assets, taking control over how these assets are allocated in the event of your death will ensure your family and other beneficiaries receive assets in the manner in which you choose.

The managerial and administrative needs of high-net-worth families can be extensive, ranging from tax and estate planning to managing trusts. A family office can help meet those needs by ensuring the breadth and depth of its services is tailored to each individual family's requirements.

There are many potential objectives, both financial and non-financial, to consider in the estate-planning process. The order in which you prioritise those objectives can also change over time. It is, therefore, wise to ensure you have a comprehensive estate plan that considers your goals and circumstances.

Trusts and estate planning can be a powerful tool to protect family wealth as well as offer tax savings, which is why we can help you with the following areas:

- Ensuring the right trust is in place
- Advising on and providing detailed and clear trust information
- Advising on inheritance tax considerations
- Providing a full range of family office planning services
- Transforming your real estate into enhanced assets.



Contacts

Below are the contact details for the Baker Tilly International regional directors who can evaluate specific requirements and ensure a tailored private client team is brought together to meet business needs:

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Alternatively, to locate your nearest member firm visit bakertilly.global.

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