



precision amidst  
complexity



## Company overview

# precision amidst complexity

Known as “US Tax”, we are an energetic firm specialising in US tax return compliance and consultancy for corporations, partnerships, individuals, trusts and estates as well as UK tax return preparation and consultancy for individuals. Established for over 20 years, we are frequently recommended for the clarity and precision of our advice.

We are widely acknowledged as a strategic alternative to the “Big Four” and offer many advantages over them, as we’re keen to demonstrate.

We handle our clients’ US and UK individual, partnership, corporate, trust and estate tax affairs. This is managed under one roof using a single multidisciplinary team and is not outsourced. Indeed just working as a team means that each of our clients gains the benefit of our shared knowledge. This is why we have such a varied client base ranging from artists, hedge fund managers, chief executives, investment bankers, entrepreneurs, charity trustees and employers.

Indeed the majority of our clients are referred directly to us by existing UK accountants, financial advisers, lawyers and investment houses. They choose to come to us precisely because we are known for providing clear impartial and accurate tax advice.

American founded and owned, our team includes many American and British citizens in senior management with qualifications from both sides of the Atlantic, including two US tax attorneys. This accounts for why American expatriates and foreign nationals and tax directors form long and fruitful relationships with us. It is our quality of advice that sets us apart. Tax may be complex but our innovative and dedicated management team is passionate about it.

And it shows.



## US Individual Tax

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Almost every US citizen and green card holder living outside the United States still needs to file annual returns with the IRS in addition to local tax authorities.

A move overseas exposes you to additional tax compliance and planning issues. These can include the filing of reports of foreign bank accounts, claiming exclusions of income and avoiding double taxation.

Even non-Americans may have US filing requirements - for example, people moving to work in the US, partners of a US partnership, owners of US property or those doing business in the United States may need to file tax returns. The list of possibilities to get caught out is a long one...

Our management team of highly qualified and skilled US attorneys and tax professionals each have an average of 10-15 years of experience in these issues. We provide practical and bespoke assistance in all areas of individual tax compliance and planning.

The individual tax team of US Tax & Financial Services can assist you with:

- Tax return preparation
- Advice on foreign tax credits
- Tax implications of investments and capital gains
- Pension tax planning
- Business taxation
- State tax advice



## US Corporate Tax

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As part of a successful plan for growth, whether your US business is expanding overseas or if you are thinking of doing business in a US location, you really ought to have a tax strategy. How do you invest tax efficiently? What's the best way to move money? How do you reduce the overall tax burden? We already know the answers.

Our US tax experts can discuss your options either in person or via a webmeeting.

Led by a US tax attorney, and as a Premier Alliance partner with Tax Technologies Inc, leaders in US corporate tax software, we are able to offer guidance and compliance assistance to US companies of any size.

Here are just some of the topics we frequently address:

- Tax-efficient structuring
- Funding of investments
- US corporate tax compliance services
- US Partnership tax services
- FAS 109 and FIN 48 assistance
- Cross- border M&A services
- Cash repatriation optimization
- ITINs and US withholding tax compliance
- Use of double tax treaties



## UK Individual Tax

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All expatriates living in the UK can minimise their exposure to UK tax by a tax efficient structure of their compensation packages, assets and investments.

We recognise the importance of coordinating tax planning in accordance with the tax legislation of the UK and other countries. This achieves the most beneficial tax treatment for individuals living in the UK and moving to work and live abroad. Early and timely advice can help significantly in not only reducing overall taxation, but also in avoiding the pitfalls of penalties for either not filing timely, or correctly.

### Services provided:

- Preparation of UK individual income tax returns for UK residents and non-residents.
- Initial entry and exit interviews to advise individuals on the tax consequences of their stay in the UK.
- Dealing with UK Inland Revenue correspondence and enquiries.
- Advice in respect of utilising UK tax treaties with other countries to avoid double taxation.
- Extensive experience of dealing with the Inland Revenue in respect of tax audits.
- Operation of UK payrolls.
- Preparation, review and negotiation of employment packages to provide tax effective compensation.



## Estate Planning & Trusts

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Without proper Estate Planning, US citizens and residents can be subject to substantial tax on the transfer of their assets to their loved ones by gifts or at death.

US Tax and Financial Services has been assisting US taxpayers with estate and gift tax planning for over 20 years. Planning, including the use of trusts, life insurance, and properly drafted wills can often reduce the burden imposed by the US tax system.

### Services provided:

US Tax and Financial Services can assist you and your financial team with the following:

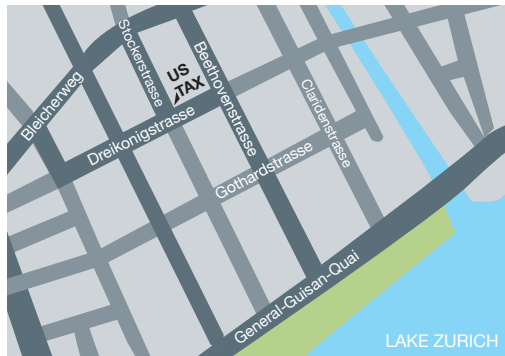
- Tax efficient structuring of your overall estate.
- Integration of US and UK estate and gift tax rules to minimize the tax burden to your estate.
- Annual review of US and UK income and capital gains tax rules.
- Effective use of income tax and estate and gift tax treaties.
- Review of wills and trusts for US tax implications.
- Coordinated planning with your UK legal and financial team including pension and life insurance advisors.
- Income tax, trust and estate and gift tax return preparation.



Get in touch

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Our principal office is situated at London Bridge, close to the City of London. We also have an office in Zurich and a serviced office in Geneva.



#### For US Individual Tax

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