



BEACON GLOBAL
ADVISORS



The Importance of Selecting an Advisor with Expat Expertise

Overview

- U.S. expats face complex multi-jurisdiction financial and tax challenges.
- A knowledgeable advisor can simplify your investments, taxes, savings, and estate planning.

Key Considerations

Fiduciary Standard:

- Advisor must act solely in your best interest.
- Fee-based structures align their rewards with your portfolio's growth.

Cross-Border Investing:

- Look for expertise in managing diversified, multi-currency portfolios.
- Ensure they understand risks like PFICs and currency fluctuations.

Local Tax Expertise:

- Must be adept with both U.S. and host country tax laws and treaties.
- Critical for avoiding overpayments and compliance issues.

Estate Planning Abroad:

- Ensure your plan is adaptable to both U.S. and local legal requirements.

Inheritance Tax Guidance:

- Advisor should handle diverse inheritance rules based on domicile and asset type.

Our Commitment

- Beacon Global Advisors specializes in cross-border wealth management for expats.
- We provide personalized, fiduciary advice to maximize your global financial strategy.

Next Steps

- Beacon Global Advisors specializes in cross-border wealth management for expats.
- We provide personalized, fiduciary advice to maximize your global financial strategy.

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