EDUCATIONAL SEMINARS FOR AMERICANS LIVING OVERSEAS

Wealth Planning – Investing - Tax

BIOGRAPHIES

Tony McLoughlin
Director
London & Capital

Tony has been working in partnership with international private clients and their advisers for over 30 years and was instrumental in the development of the Group's US operations.

Tony is London & Capital's technical in-house investment expert on portfolio construction, specifically relating to UK resident non-domiciled families and in particular to US citizens living in Europe.

Adam Myers
Associate Director
London & Capital

Adam joined London & Capital in 2007, initially working in the firm's Miami office, serving both US and UK private clients.

In 2010, he returned to London to help establish the Group's US Family Office and has since supported the division to become the leading adviser to American clients living overseas. More recently, Adam has been helping the division's geographic expansion across key European locations.

Adam has a degree in Business Management from the University of Birmingham and has been awarded the Diploma for Financial Advisers from the London Institute of Banking & Finance.

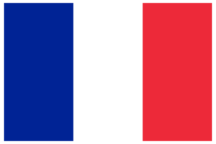
EDUCATIONAL WORKSHOP FOR AMERICANS LIVING OVERSEAS

- There are estimated to be over **9m** Americans living outside of the US and over **1m** in Europe.
- Americans face the issue of **reporting on their worldwide assets** each year and have strict rules on what they can invest in.
- Due to differences in succession laws, US citizens must create a plan taking into account their global assets, not just the local rules where they reside.
- In **France** where it is estimated over **200,000** Americans live, there are only **23 registered enrolled agents** or CPAs.
- Our educational seminars across Europe allow individuals access to professionals to answer planning questions they may have.

WORKSHOP PROGRAMME GLOBALLY

Over the past 3 years we have been asked to host educational seminars in a variety of locations.

These have included:



France
Paris (5), Lyon, Rennes,
Cannes (2), Nice (2)

Portugal
Lisbon

US
New York, Miami, Boston,
Washington.

Israel
Tel Aviv

WORKSHOP PROGRAMME GLOBALLY

These seminars have been hosted in conjunction with a range of American associations, as their members were struggling to find advice in the locations they live.

The Associations include;

- American Club of the Riviera
- The Franco American Institute
- Americans Women's Club
- American Club of Lyon
- American Women Lawyers of London
- Association of American Women in Europe
- Ivy League Association of Paris
- The American Hour
- Association of American Residents Overseas
- American Citizens Abroad
- Alumni Groups including Harvard, Wharton, Yale
- Republicans and Democrats Abroad
- IECnet – International Associations of Accountants Auditors and Tax Consultants

WORKSHOP PROGRAMME

WORKSHOP PROGRAMME

A variety of presentations, tailored to the membership of each group. Topics have included:

1) **PLANNING** - Planning challenges that Americans face whilst living overseas
2) **INVESTMENT** - Overview of the current investment environment
3) **PLANNING** - Case study – Including a local lawyer and accountant covering tax and estate planning
4) **INVESTMENT** - Global banking issues facing Americans whilst living abroad
5) **REGULATION** - Changing regulatory environment and how that impacts Americans living overseas
6) **TAX & REPORTING** - Reporting obligations and challenges for Americans living overseas
7) **TAX & REPORTING** - Managing your affairs effectively by understanding and utilising tax treaties

WORKSHOP PROGRAMME

Options:

- Large group presentation for up to 40 people
- Smaller focussed roundtable

All event arrangements made by London & Capital, including venue, food and drink.

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WORKSHOP PROGRAMME

Hosted in conjunction with local professionals and international firms who specialise in dealing with Americans with international issues, these have included:

McDermott Will & Emery

Withers LLP

Baker McKenzie.

kga Avocats

US TAX & FINANCIAL SERVICES

HTS Horton Tax Services Steven R. Horton, CPA

THE BENEFITS

1) **Complimentary access -** to accountants, lawyers and investment managers who specialise in global US issues.

2) **Events tailored –** to the members needs, specifically focussing on the issues commonly arising for members in their jurisdictions.

3) **Up to date advice** - effective asset allocation, tax changes, reporting requirements and regulatory changes.

4) **Detailed case studies -** giving examples to members of issues they may face and how to overcome them.

5) **Organisation -** fully arranged and run by L&C, inclusive of food, drink and venue.

WHO WE ARE

London & Capital

- Global wealth management company
- FCA and SEC regulated
- Assets under management are $3.8bn*
- 100% owned by management team
- Global custodians
  - Royal Bank of Canada
  - Transact
  - Julius Baer
- Award-winning capital preservation solutions and strategies

** As at 13 December 2018*

US Family Office Solution

- Advising US clients since 1989
- Recognized as one of the leading independent wealth manager for US families
- 3 stage process:
  - Tax optimised wealth planning & structures
  - US compliant investment management
  - US / French / multi-currency investment reporting
- Working in partnership with all leading global lawyers and accountants
- US domestic and international custodians

Our recent awards:

Top Recommended Ultra High Net Worth Wealth Manager 2019

Best Ultra High Net Worth Team 2018

Family Office Individual of the Year 2018

Best Private Client Asset Manager of the Year 2017

Best Private Client Investment Team UK and Best Bespoke Investment Solutions Provider 2017

OUR US FAMILY OFFERING

Strategic wealth planning

- US/Global tax efficient financial planning
- Global pension planning
- Residential/commercial real estate purchase and finance
- Ability to manage money globally

→

Globally compliant investment management

- US compliant investment strategies
- Actively managed direct stock and bond portfolios
- Passive US ETF solutions
- Multi-currency & multi asset investing
- Capital preservation ethos

→

Consolidated Reporting

- Consolidated reporting on global assets
- Calendar year reporting
- Separation of long and short-term gains
- 1099/FBAR information
- €/$/£ FX gains and losses

London&Capital

QUESTIONS?

Contact us

We hope you have found this document useful. If you would like to attend one of our fortnightly investment meetings please let a member of the London & Capital Team know. The meetings take place on a Tuesday morning from 8.15am to 9.15am (GMT) at our London offices and we are happy to reserve you a place.

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Important information