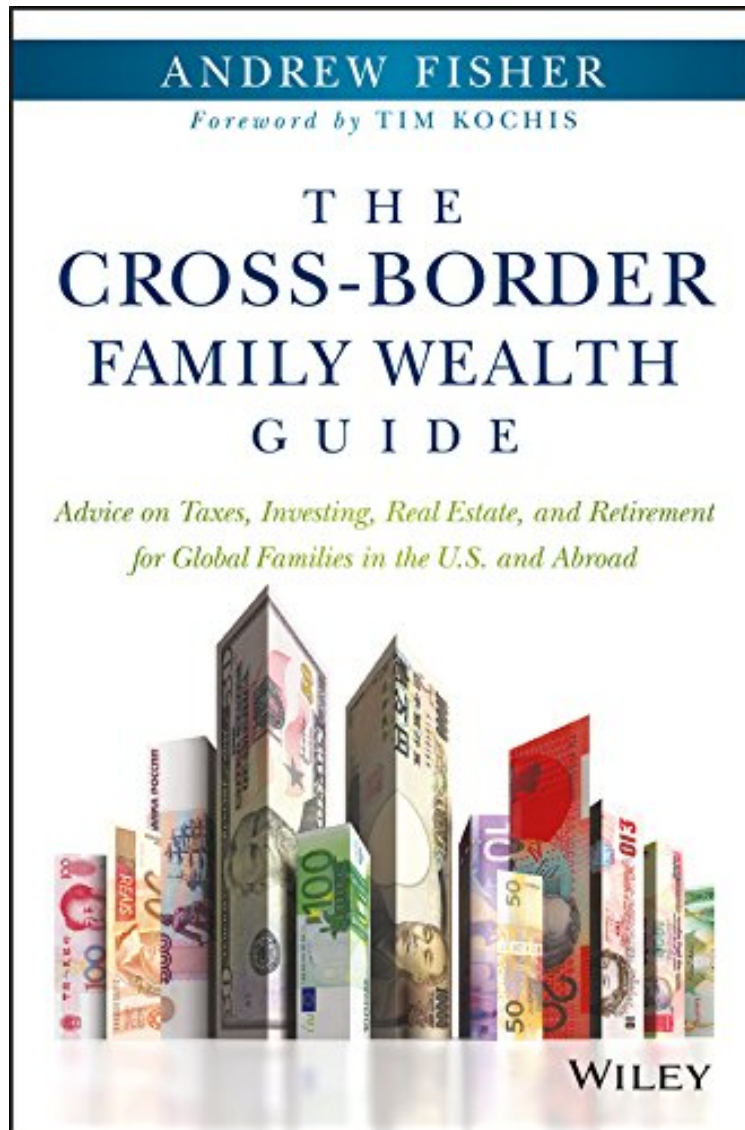


[PDF] The Cross-Border Family Wealth Guide: Advice on Taxes, Investing, Real Estate, and Retirement for Global Families in the U.S. and Abroad

The Cross-Border Family Wealth Guide: Advice on Taxes, Investing, Real Estate, and Retirement for Global Families in the U.S. and Abroad

Andrew Fisher

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Andrew Fisher : **The Cross-Border Family Wealth Guide: Advice on Taxes, Investing, Real Estate, and Retirement for Global Families in the U.S. and Abroad** before purchasing it in order to gauge whether or not it would be worth my time, and all praised **The Cross-Border Family Wealth Guide: Advice on Taxes, Investing, Real Estate, and Retirement for Global Families in the U.S. and Abroad**:

1 of 1 people found the following review helpful. Required reading for international families
By T. Pedrotti
This is a great introductory book to the problems facing families working in multiple countries and therefore under different tax jurisdictions over the course of their lives. It would deserve a 5-star rating for the problems that it highlights. Unfortunately is a bit short on specific solutions, mostly due to the fact that the possible combinations are too many and the personal circumstances may vary greatly. So read this book as a guide to develop the questions pertinent to your particular situation to ask your international tax counselor.
0 of 0 people found the following review helpful. For international persons learning process
By Ldxa
Excellent topics for international clients to learn , and look for the specialist
1 of 3 people found the following review helpful. Helpful for those moving abroad
By Jacqueline Bugnion
The author has outlined the very complex fiscal and investment decisions that individuals face when either the immigrate to the United States or immigrate overseas, whether or not they are U.S. citizens. It provides an excellent overview of the issues.

Make sense of international personal finance with expat-specific expert advice
The Cross-Border Family Wealth Guide is the long-awaited financial handbook for cross border families, with expert insight from a financial advisor who specializes in expat issues. Whether you're an American living abroad, or foreign-born and living in the U.S., this book demystifies the complex issues surrounding the worldwide tax system, international information reporting, sensible investments, international real estate, and retirement planning. When your wealth crosses international borders, managing even the most mundane financial affairs can become wrought with time-consuming complexity; moving money, opening accounts, dealing with currency risks and translation, and setting up investments suddenly involves a whole new set of rules and regulations. Your 401(k), IRA, or annuity must be handled properly to retain certain tax benefits, and retirement planning takes on a brand new dimension of difficulty. This book shows you how to navigate the maze to make sure your money keeps working for you. Real world examples illustrate solutions to common problems, and real, actionable advice gives you a solid plan for your next steps. While personal finance management is rarely simple, the recent crackdown on tax havens and increased tax collection vigilance has made things even more difficult for cross border families. This book answers your questions, and shines a light on the way forward to long-term financial security for international families. Navigate the complexities of international taxation
Get specific guidance on retirement planning
Make sense of how real estate fits into your financial picture
Invest appropriately to maximize growth for the future
Manage your assets and tax benefits across borders
With the right know-how, cross border professionals can make sensible investment and financial planning decisions, but credible guidance is rare and difficult to find. Simple and practical, with targeted advice, The Cross-Border Family Wealth Guide is the international family's solution for avoiding financial confusion.

From the Inside Flap
Managing personal finances is always a challenge. For those who are either foreign citizens living in the states or U.S. citizens abroad, the simple process of planning for retirement can seem impossible due to the complexities of managing money across borders. The Cross-Border Family Wealth Guide demystifies the issues relating to taxes, investing, real estate, and retirement and then sheds light on many little-known opportunities available to cross-border families. Whether your cross-border financial connection involves a job, inheritance, property, or other investments, this book deals with many of the most common challenges people face when managing wealth globally. The information here is grounded in research and experience both advising hundreds of families facing cross-border concerns and interviewing dozens of experts in the field. The underlying link between all of the advice inside is asset efficiency—specifically, how to best protect and grow your assets for retirement, while minimizing taxes and optimizing growth. In today's world, you can't rely on a company or government to provide for your retirement, and this straightforward guide puts you in control of your own financial health with comprehensive, up-to-date advice on: Building a diversified, global investment strategy in a low cost and tax efficient way, while also controlling risk Utilizing and optimizing 401(k) and IRA retirement savings plans in the U.S. or an equivalent foreign retirement plan Understanding the tax benefits and investment characteristics of owning and renting real property
The material in this user-friendly guide works both for those with limited investment experience looking to develop a cross-border investment strategy, as well as for experienced investors in need of retirement advice to avoid getting blindsided by unexpected taxes or difficulties when drawing from their savings. Globally mobile families need special financial guidance for their unique lifestyles, and The Cross-Border Family Wealth Guide ensures that you have that information on your side.
From the Back Cover
"Andrew Fisher's The Cross-Border Family Wealth Guide comes to the rescue of those who may not even realize that they need to grapple with tax, financial, and investment requirements and opportunities that are extraordinarily complex; The Cross-Border Family Wealth Guide reveals proven pathways out." From the Foreword by Tim Kochis, JD, MBA, CFP®; THE AUTHORITATIVE PERSONAL FINANCE GUIDE FOR EXPATS
The Cross-Border Family Wealth Guide is the financial guidebook cross-border families have been waiting for to clarify and streamline the complexities of global wealth management. For Americans living abroad and foreigners living in the U.S., this helpful resource details how to navigate the ever-changing rules and regulations which complicate saving and investing, and planning for retirement. Insightful case studies from the

real world will prepare you to implement this accessible advice from an accomplished financial advisor specializing in cross-border wealth management. The easiest way to ensure your family's financial security is through careful planning based on proven results, and by starting here you can: Gain a firm grasp on all the nuances of international taxation and how to avoid costly pitfalls Manage your assets and plan for your future with the confidence that comes with guidance aimed at your specific circumstances Design a retirement strategy that will protect and grow the assets you worked hard to earn and save The Cross-Border Family Wealth Guide is the expat's road map to long-term financial security.

About the Author ANDREW FISHER is widely regarded as a leading wealth advisor to cross-border families. He frequently writes and speaks to the unique financial planning and investment complexities faced by international families, particularly when an individual is a tax resident of the United States. Andrew holds the CFA and CPA designations, and serves as president and founder of Worldview Wealth Advisors, an independent wealth management firm focused on financial planning and investment advice for cross-border families.