

The background of the slide is a dark space filled with a complex network of glowing orange and yellow lines and dots, resembling a global network or a constellation. A thick red vertical bar runs down the left side of the image.

GLOBAL PRIVATE CLIENT SERVICES

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BDO INTERNATIONAL

A LEADING ADVISER TO WEALTHY INDIVIDUALS,
THEIR FAMILIES AND THEIR BUSINESSES.

“ It is clear that exceptional client service runs through the heart of the team at BDO. They co-ordinate high level advice for me from many different countries and I have the benefit of a single point of contact. ”

CLIENT / ENTREPRENEUR



International Departures

TERMINAL 3



“ We have worked with the BDO international network for many years now and their global private client approach is unique in the market place. They strike a balance between providing the highest quality of technical advice with a practical application and deliver this in a timely and commercial manner. ”

HEAD OF WEALTH PLANNING
GLOBAL PRIVATE BANK

WORKING TO HELP CLIENTS STRUCTURE THEIR DOMESTIC AND INTERNATIONAL AFFAIRS IN AN EFFICIENT AND COMPLIANT MANNER.

INTRODUCTION

Founded in 1963 with representation in just five jurisdictions, BDO International has developed into the world's fifth largest accountancy network with over 1,600 offices in 162 countries. Each member of our international network retains its local identity, while sharing a culture of exceptional client service and professional and personal client relationships.


Driven by a desire to offer our clients a consistently seamless service across various jurisdictions we continue to develop relationships between our member firms to strengthen the quality of our advice to clients globally.

For private clients, the need for specialist tax advice has never been greater.


All around the world, legislation is becoming more complex, tax authorities are hardening their attitudes to tax structuring and the move towards global sharing of financial information means there is an increased risk of investigation. As a result, good advice – advice that ensures our clients are operating well within the rules, whilst making their money work for them in a way that suits them and their lifestyle – is now at a real premium.

With exponential growth in demand for our cross border expertise in the wake of legislative change, increased compliance and global wealth, and with BDO's international network behind us, the Private Client teams across the BDO member firms are exceptionally well positioned to continue to deliver market-leading service to our clients.

DELIVERING EXCEPTIONAL CLIENT SERVICE
THROUGH PRACTICAL BESPOKE ADVICE, TAILORED
TO AN INDIVIDUAL'S NEEDS.



OUR APPROACH IS TO BRING OUR ADVICE TO
LIFE – ADVISING OUR CLIENTS ON THE ACTIONS
THEY CAN TAKE TO IMPLEMENT OUR ADVICE.



“ Their client service team, their expertise and their international scope are BDO's strengths. ”

SENIOR PARTNER
LAW FIRM

OUR GOAL IS TO GIVE OUR CLIENTS THE REASSURANCE THAT THEIR WEALTH IS COMPLIANT WITH THE DEMANDS OF GLOBAL REGULATORS AND STRUCTURED EFFECTIVELY FOR LONG TERM PRESERVATION.

GLOBAL PRIVATE CLIENT

Whether it's a corporate transaction, family wealth passing on to the next generation, or an investment opportunity, an individual is going to be involved somewhere along the line.

Personal tax is an integral part of any tax system in the world, and private client services are therefore an integral part of BDO's global service. We deliver value by building close client relationships, taking responsibility and delivering the right advice at the right time to meet our clients' objectives.

Our private client specialists worldwide offer not only exceptional client service, but advice of the highest integrity and quality, covering cross jurisdictional tax issues with the support of our extensive private client network.

This mutual support, and knowledge share, between our member firms ensures that our specialists continue to contribute to our clients' success by proactively delivering relevant and distinctive ideas.

We understand that all aspects of international tax advice are interdependent and all necessary in providing a full understanding of the worldwide tax implications for our clients. Our member firms work seamlessly together and with other professional advisers to ensure our clients receive the best possible advice wherever they are in the world.

Our clients can opt to have one main point of contact who is responsible for liaising with the international network as required, co-ordinating and managing the project cohesively and efficiently to take away the stress, inconvenience and delay of dealing with a number of different advisers.

GLOBAL PRIVATE CLIENT SERVICES INNOVATION CENTRE

Formed in 2003, the BDO Global Private Client Services Innovation Centre (GPCS) is the epicentre of BDO's international private client services.

The group is a global network of private client specialists with 3 main sub-groups – Europe, The America's and Asia Pacific.

Meeting regularly in key financial centres to maintain the close working relationships between its members, the aim of this specialist group is threefold:

To enhance the internal organisation/relationships – a trusted private client specialist represents each member firm, ensuring quality advice is delivered in a time efficient manner.

1

To raise awareness of technical developments throughout the international network – our specialists have a multi-jurisdictional awareness of topical issues, and have strong personal relationships with trusted local advisers who can assist their clients when necessary.

2

To provide a platform for holistic advice to global private clients to ensure that we continue to deliver what we promise.

3

“ Individual tax is an integral part of any tax system in the world, and private client services is an integral part of BDO's global service.


With individuals becoming increasingly international, demand for cross-border expertise continues to grow in the wake of legislative change, increased compliance and global wealth.

The personal and trusted relationships throughout the BDO international network provide a strong platform for our private client specialists worldwide to leverage off, ensuring the private client teams in all member firms are well positioned to continue to proactively deliver a seamless and competent service to our clients. ”

JEFFREY B. KANE

BDO, Chair of Global Private Client Strategy Group

EACH CLIENT HAS AN EXPERIENCED PARTNER AND A PROACTIVE, DEPENDABLE TEAM OF SUPPORTING SPECIALISTS WHO UNDERSTAND GLOBAL CHANGE.



OUR GLOBAL PRIVATE CLIENT SERVICES INNOVATION CENTRE IS A GLOBAL NETWORK OF TRUSTED PRIVATE CLIENT SPECIALISTS WITH MULTI-JURISDICTIONAL AWARENESS OF CURRENT ISSUES AND A COMMITMENT TO EXCEPTIONAL CLIENT SERVICE.

OUR GLOBAL APPROACH

UNDERSTANDING OUR CLIENTS' NEEDS

Many of our clients are business owners or entrepreneurs with complex international affairs – we realise that we need to invest quality time getting to know our clients' objectives and interests.

BUILDING RELATIONSHIPS

We pride ourselves on building a personal, trusted relationship with our clients, through which we are able to provide exceptional client service, proactively seeking opportunities to monitor and improve their global tax position. We provide upfront proposals to agree scope/fees to ensure no surprises.

PROVIDING INTEGRATED ADVICE

Our clients can opt to have one main point of contact, who is responsible for liaising with the international network, co-ordinating and managing the project cohesively and efficiently to take away the stress, inconvenience and delay of dealing with a number of different advisers.

BUILDING A TEAM OF TRUSTED PROFESSIONALS

We help our clients to build a trusted professional team around them, introducing them to bankers, lawyers, trustees, real estate agents and investment managers globally.

BRINGING THE ADVICE TO LIFE

We assist our clients and their team of professional advisers to implement our advice and offer ongoing compliance and assurance services as required.

SUSTAINABLE RELATIONSHIPS

We don't just disappear – as their trusted adviser, we stay in touch with our clients and assist in any way we can, making sure that we keep up to date and familiar with our clients' affairs to allow us to proactively manage their global tax position on a timely basis.

COMPLIANCE AND REGULATION


The global tax climate is constantly changing and individuals with global assets now face heavier regulation and compliance burdens in relation to their financial affairs than ever before. With the ever increasing global tax transparency, individuals need to be proactive simply to ensure they are complying with all the rules and regulations imposed by various countries.

BDO's private client specialists are well equipped to assist individuals with their global compliance obligations, utilising the BDO international network to ensure that these obligations are fulfilled at both a domestic and international level. With differing and, sometimes, conflicting tax laws in different

countries, advice from each jurisdiction where assets are located, or a family has presence, is interdependent in ensuring all compliance obligations are fulfilled seamlessly and in a tax efficient manner.

With such complexity to consider, it is not uncommon for certain compliance obligations to have been overlooked. Our tax dispute and resolution teams offer a variety of services to individuals who are seeking to resolve historic inaccuracies with tax authorities to regularise their affairs. We can then assist going forward with preventing tax disputes with our annual compliance services.

WE JUDGE OUR SUCCESS BY OUR ABILITY TO DEVELOP LONG TERM RELATIONSHIPS WITH OUR CLIENTS AND CONTACTS, THROUGH THE STRENGTH OF OUR TEAMS OF SPECIALIST ADVISERS.



“ The international aspect of BDO's work makes them stand out but they have a range of strengths we and our clients draw on. ”

HEAD OF PROFESSIONAL PRACTICES
GLOBAL BANK

AREAS OF EXPERTISE

As trusted advisers to entrepreneurs and owner managed businesses, the Private Client specialists across the BDO international network have vast experience in looking after the tax affairs of wealthy individuals, their families and their businesses.

OUR PRIVATE CLIENT SERVICES INCLUDE

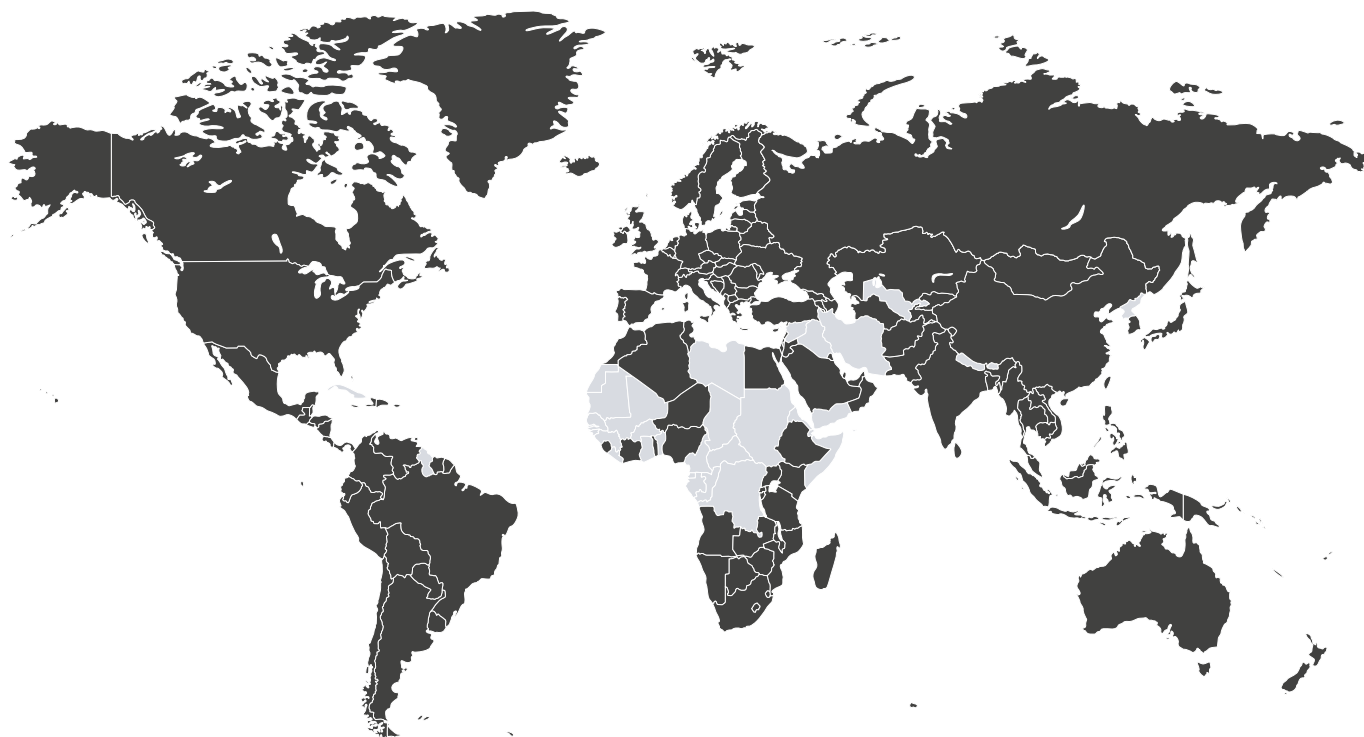
WEALTH AND ASSET STRUCTURING	SUCCESSION PLANNING	FAMILY GOVERNANCE
BUSINESS STRUCTURING	COMMON REPORTING STANDARDS	TAX COMPLIANCE
INTERNATIONAL TAX CO-ORDINATION	PRIVATE EQUITY	FAMILY OFFICE ADMINISTRATION
PROFIT EXTRACTION/ TRANSACTION SUPPORT	DIVORCE/MATRIMONIAL	TRUST ADMINISTRATION
BUSINESS EXIT PLANNING	YACHT AND PLANE STRUCTURING	PROFESSIONAL PRACTICES

We also have deep sector specialisms on a global scale in the following areas:

- Technology, life sciences, telecommunications, media and entertainment
- Natural resources
- Real estate and construction
- Financial services
- Public sector
- Consumer business
- Healthcare
- Manufacturing
- Professional services
- Not-for-profit.

WE ENSURE DEPTH THROUGHOUT OUR TEAMS, WITH AN ACTIVE PROGRAMME OF DEVELOPMENT FOR OUR PEOPLE.

BDO INTERNATIONAL



WE ARE COMMITTED TO DELIVERING A MARKET LEADING GLOBAL PRIVATE CLIENT PRACTICE. WHEREVER OUR CLIENTS ARE OR WANT TO BE, WE ARE THERE TO SUPPORT THEM, THEIR FAMILIES AND THEIR BUSINESSES.

CLIENT SERVICE AT THE CORE

Global professional staff to partner ratio





The infographic features a large, light gray circle on the left side, which serves as a background for the statistics. To the right, a globe is depicted as a collection of interlocking puzzle pieces, with several pieces scattered on the surface below it. The statistics are arranged vertically, each preceded by a black dot and a horizontal line that connects to the large gray circle.

2018/2019

WINNER ACCOUNTANCY FIRM OF THE YEAR,
STEP PRIVATE CLIENT AWARDS

OUR NETWORK

1,600

OFFICES

162

COUNTRIES AND TERRITORIES

US\$9

BILLION GLOBAL REVENUES

80,000

HIGHLY SKILLED PARTNERS AND
STAFF WORLDWIDE

FOR MORE INFORMATION:

For more information on any of the services listed in this document, or for assistance with any domestic or international tax query, please do not hesitate to get in touch with your usual BDO adviser or one of the individuals listed below, who will be able to assist or introduce you to a private client specialist in a relevant BDO member firm:

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