

# **Global Family Wealth Planning Guide**

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## Why This Guide Matters

When wealth crosses borders, so do risks. This guide helps globally mobile families address tax residency, compliance, and estate complexity across jurisdictions.

### Key Strategy Checklist

- Determine primary tax residency and understand local tax laws
- Map out global asset locations and reporting requirements (FATCA, CRS)
- Set up trusts that are valid and compliant in multiple jurisdictions
- Review citizenship implications on inheritance and gifting
- Educate heirs on international rules and reporting obligations

### Continue Exploring

For more insights on planning, strategy, and building long-term wealth, explore additional resources or subscribe for future updates.