



EWP for Tomorrow's Movers and Shakers

PPLI for International Entrepreneurs

International tax planning is best done before fortunes are made. Rarely does this occur. [Our firm](#) is fortunate to have a case where [Expanded Worldwide Planning](#) (EWP) is benefiting one such person. By consolidating his worldwide holdings, which are in the startup phase, inside a properly constructed [Private Placement Life Insurance policy](#) (PPLI), we are securing these benefits for him:

- All assets inside the PPLI policy receive tax deferral, not only investments, but business income too.
- The assets pass tax-free to the beneficiaries named in the PPLI policy. In a properly structured policy one creates a tax-free environment for these assets. Assets can be located anywhere in the world.
- Because life insurance is used, FATCA and CRS reporting is greatly simplified, and in some cases, is eliminated.
- Families receive enhanced privacy, because the insurance company becomes the beneficial owner of the assets inside the PPLI policy.
- The EWP structure provides excellent asset protection.
- The EWP structure is low cost with fees averaging 1% of assets.
- The EWP structure is fully compliant with the tax authorities of all tax jurisdictions.
- Should an untimely death of the wealth creator occur, his family is protected with a tax-free PPLI death benefit.

Our client has businesses in natural resources, sports, gaming, trading, content management, and investments. His enterprises are in the U.S., Europe, and Africa. He is a U.S. Green card holder with residence status in the U.K., and travels with a passport from a third country. His startup businesses only generate \$2-3MU.S. annually with outstanding potential to grow to \$5-10MU.S. in just a few years. *He is a perfect candidate for EWP planning, and coming to us at the most opportune time.*

When you work in a field you sometimes take things for granted that are really quite extraordinary. This is the case here. I was having lunch with a friend a few days ago, and told him what our firm was doing for this client. My friend was astonished and said, “This is a perfect fit.”

If you know additional “perfect fits” please let us know, and we can accomplish the same for them. Thank you for your continued trust and support.

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