Belhomme
LAW

International Tax And Wealth Planning Strategy

Copy the Ultra Rich

We will teach you how the global elite get and stay wealthy and how you can too.

Paying too much tax?

We will work alongside you to come up with and implement a plan that can reduce your tax burden to low to no tax. In fact, we guarantee it (see our High Networth Commitment below).

Feel beholden to one Government?

We can obtain residency permits and additional citizenships that suit your lifestyle and dreams.

Need to upgrade your advisor and network?

We are the true international legal counsel with a network that can solve all your problems globally.

Worried about what you don’t know?

We will review your life alongside you and provide a full legal, tax and regulation memo diagnosing your specific situation and making key recommendations.

Hate lawyers and legal jargon?

We work to develop a strong relationship, are easy to interact with and provide visual content and summaries easily breaking down options available to you.

Find tax reporting soul destroying?

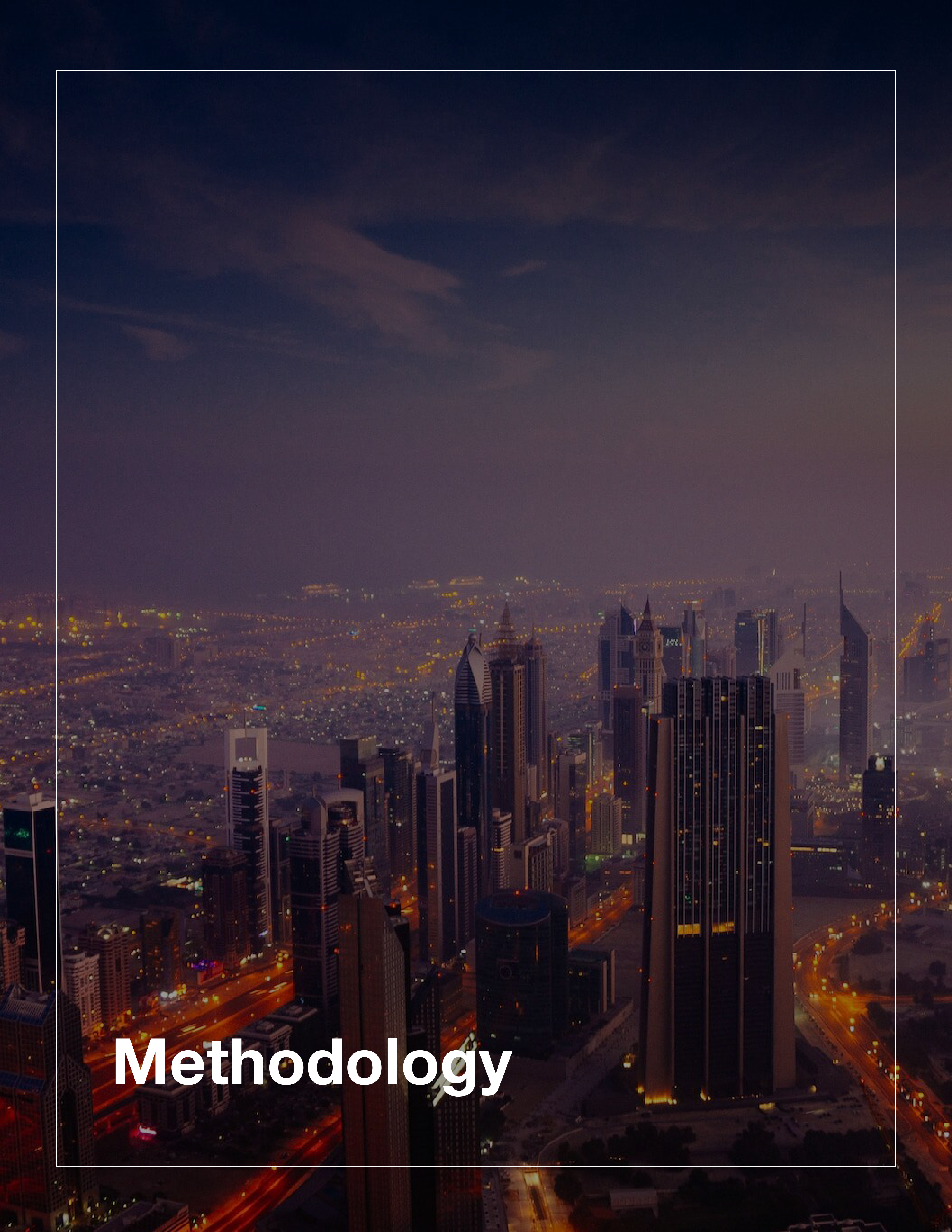
We help you to manage key information to make annual reporting simple.

Want to keep up to date with changes?

As the leading global diagnostic legal practice, we will keep you appraised of legal, tax and other changes around the world that might affect you.

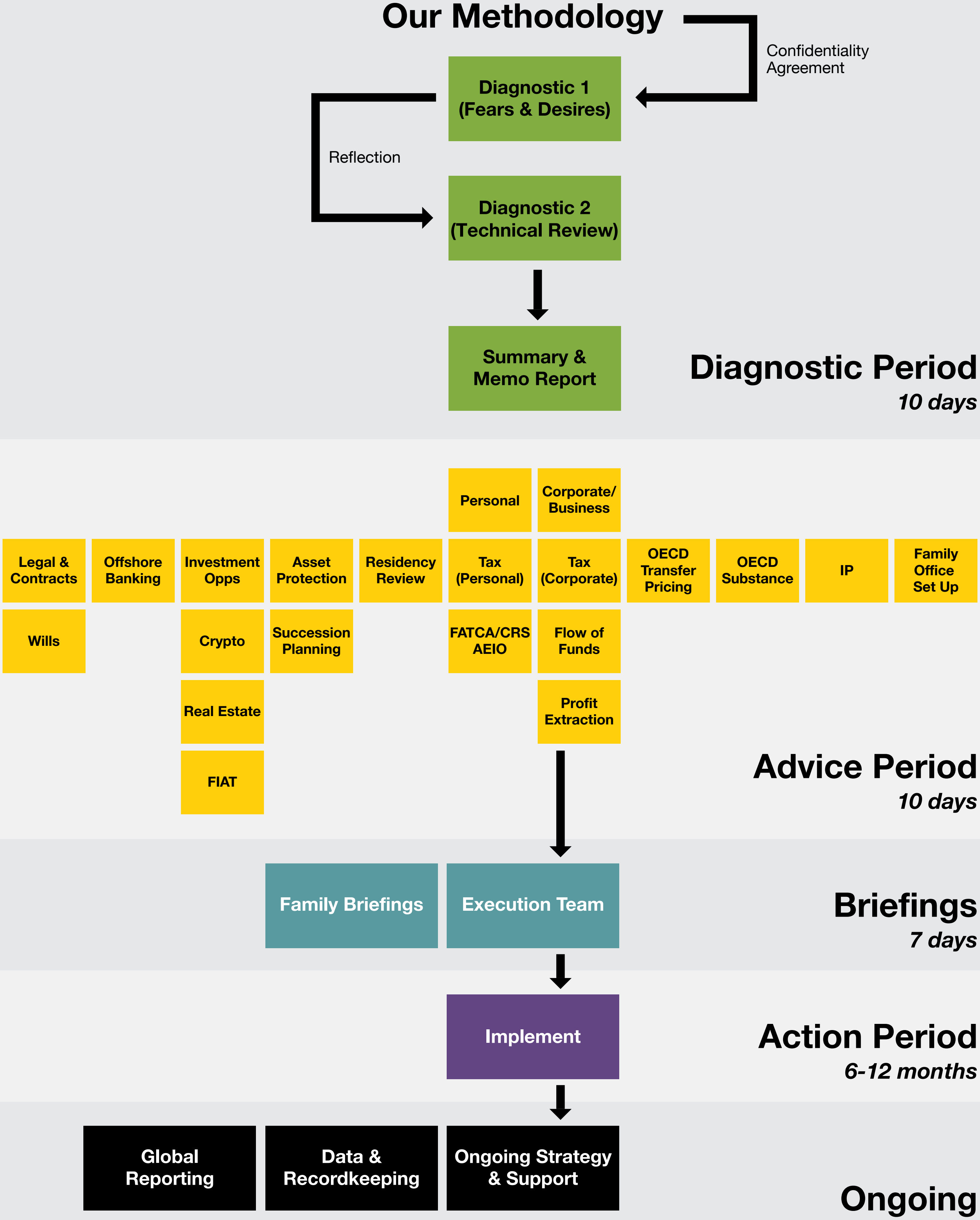
Do you have big crypto asset gains?

Our clients also hold often crypto assets with big gains, and we have supported them to ensure they don’t lose their substantial gains to excessive taxation.



Methodology

Our Methodology



OUR METHODOLOGY

Step 1: Exploration Call

You can book an exploratory call **here**. We meet on-line for 30 minutes to build rapport together and to decide whether we want to work together. It is a no pressure call to explore your problems and understand what you need.

Importantly we will send you after this meeting a Confidentiality Agreement. We want you to feel comfortable enough to share important and private information with us and know that we will treat it with the absolute confidence that it deserves.

On this call we set a date and time for the first diagnostic call.

Step 2: Diagnostic 1

We conduct an initial one-hour video call to understand your life ambitions and your main concerns.

During this video call we dive deeper into your life ambitions and main concerns. We believe it makes sense to understand your ambitions and background before we approach the more legal and tax review. This allows us to understand the context in which we need to put our legal and tax analysis and recommendations. We then schedule a date for the second diagnostic video call.

Step 3: Diagnostic 2

This second more complex video call is where we go technical. We will draw out together all your multi-jurisdictional connections, where funds are flowing, reporting obligations are, where assets are, and which countries you are exposed to now and potentially in the future. Often for our clients this is the first time they have ever mapped out their affairs and seen the big picture.

Step 4: Deliver of Full Analysis and Recommendations

We then deliver the full analysis, firstly agreeing a date and time with you to discuss the report and the delivering it to you in advance of this date.

The full report not only outlines your full global legal, tax and regulatory position but also importantly our strong recommendations on how you can improve this position and implement the life you want.   People often feel a sense of relief as for the first time they can see what they need to manage, and have someone alongside them helping them to do so. Before, they didn't know what they didn't know. Now, they are clear.

Step 5: Implementation

Six months support and guidance in implementing agreed on recommendations.

This is usually a six-to-twelve-month project, and we will work with you to scope out what needs to be done and what budget needs to be assigned.

We then move into action. We will work alongside you and provide all the guidance you need in order to make the changes you need and to implement the plans we have discussed. Often this will involve completing tax simulations in countries you may wish to move to, opening bank accounts, obtaining visas and even second citizenships. It may involve setting up companies and trusts. We will open our extensive global network to you, to help you execute wherever you need to ne globally.

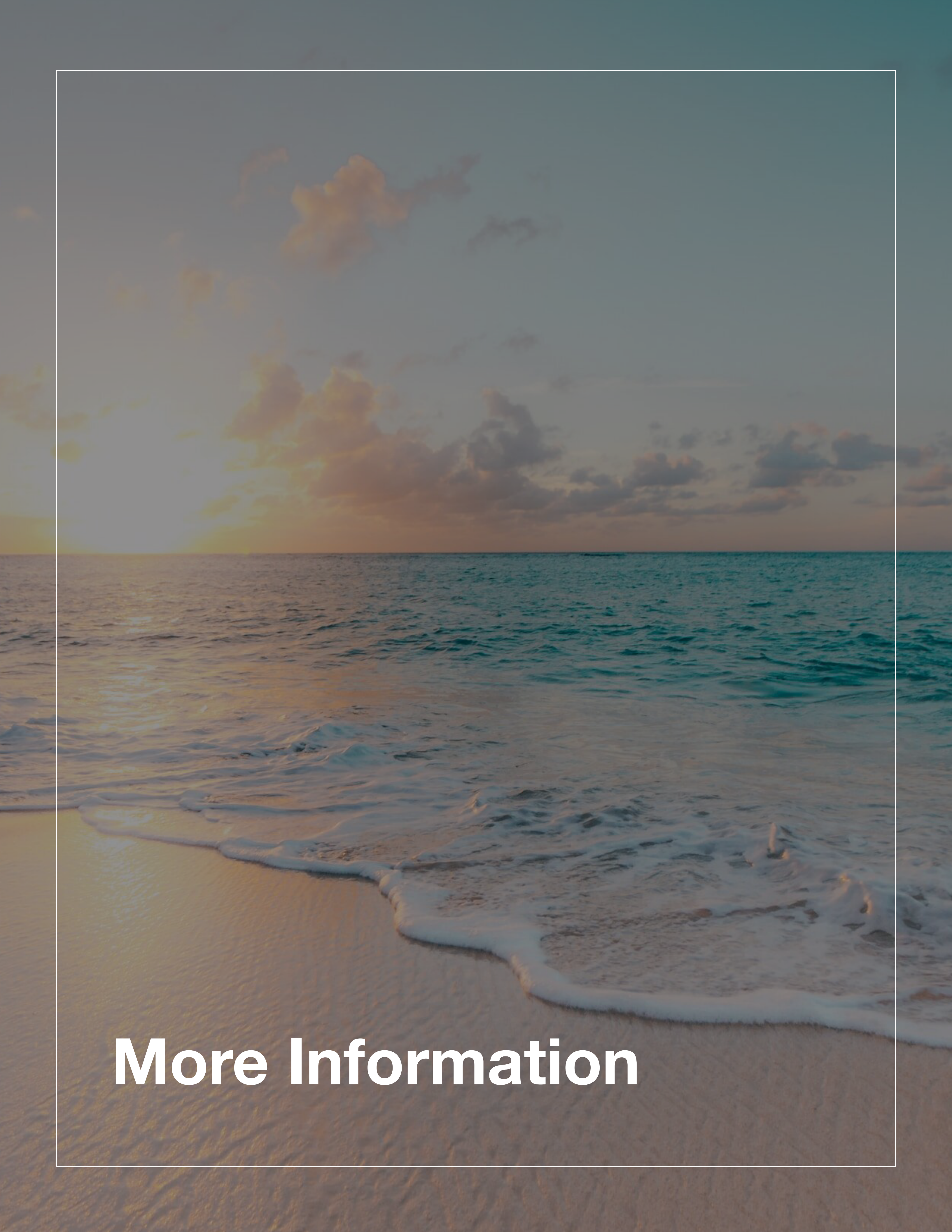
Ongoing: Continued Guidance and Support

We don't see this as a one time piece of work. We like to work with clients where we can develop long term relationships. Often, our strategies are developed and implemented over years, not months, and are made to be flexible for changes and unexpected events. We appreciate our clients build trust with us, and don't want to lose that. We hope we can build a lifetime and fruitful working relationship with you and your family.

Our Areas Of Competency

At our legal practice we cover the key tenets of international law, cross-border taxation and complex wealth, estate planning and structuring which are:

- Complex, multi-country and jurisdictional exposure review and counsel
- **Global Taxation and Tax Optimisation**
- Withholding Tax analysis and Withholding Tax Reclaims
- Tax Treaty analysis and benefits
- **Asset Protection Strategies**
- **Creditor, Divorce and other Litigation Protection**
- Bi-Lateral Investment Treaty Protection
- **Corporate entity set up**
- **Family governance entity set up, such as Trusts and Foundations**
- Succession Planning
- **Private Banking Account Opening**
- Bankability Management
- Flow of funds analysis between jurisdictions and entities
- Automatic Exchange of Information management (FATCA/CRS)
- **Confidentiality and Privacy Augmentation**
- Public Beneficial Owner Register overview and management
- **Crypto & Digital Assets Taxation and Protection**
- Crypto Token Analysis
- OECD Corporate Substance Requirements Guidance
- OECD Transfer Pricing Analysis
- **IP Warehousing & Connected Licencing Matters**
- Controlled Foreign Company Rules analysis



More Information

HOW WE WORK

Tight teams get things done.

We are a focussed team of top pedigree professionals who supplement our specific execution team for your case from our network of trusted professionals built from over 20 years in practice.

What makes us a great legal partner is:

- We keep you up-to-dated and can always find the legal position in any scenario.
- Apprise you of the latest legal developments, and what is happening in practice.
- Provide sound counsel applied to your specific situation.
- Responsive and accessible.
- Work at a high speed and pace.
- Confidentiality and privacy are in our DNA
- Easy to work with, using modern tools and methods.
- Very well networked, well-known, and highly regarded.
- We use clear and strong communication.
- Proven ability and focus on trying to protect you from downside risks in your life.
- Well-Thought-Out Contract Construction
- Empathetic and good listeners.
- Maintain a high pedigree client book.

We are always developing and improving our own business.
We are not stagnant.

The practice is led by Ross Belhomme LL.M, LL.B (Hons), DFSM, TEP who is based out of our Zürich, Switzerland office. Ross can be reached at ross@belhommelaw.com.

Belhomme Law is headquartered in Geneva, Switzerland

What We Are Not

Jack-of-all trades. We are subject experts and keep that focus.

On-the-clock, out-of-control, hourly charging without delivering anything of value.

Advisors who deliver fluffy or overly complex commentary that is not helpful nor executable.

A team with an overly narrow and missing inter-connected or inter-jurisdictional considerations.

Unresponsive, sluggish, 9am to 5pm attitude.

Using an ill-thought out and inoperable technology set-up.

Misunderstanding what is the real pain point you are facing.

Disrespectful of confidentiality.

Inflexible and uncreative.

Bad listeners, or lacking empathy.

Either rushing you into decisions when it is the wrong time to make them, or the opposite, not being candid with you when you need it.

Who This Is Not For

Those who are not up for considering an international lifestyle and mindset.

People who are not open to building a long-term relationship with us.

Short-term thinkers who cannot take a holistic, global and multi-year planning approach to their wealth and dreams.

Generally, not for people who want just to bounce ideas off us and not engage in our full methodology.

However we do have clients where we act more in a legal coaching capacity and you can book and pay for 1 hour or 2 hour call here: **https://www.belhommelaw.com/single-sessions**

Those not prepared to provide a budget of at least USD10,000 to the implementation stage.

OUR HIGH NETWORTH 60% COMMITMENT

We guarantee that you if you follow our methodology, we will find a way to reduce your tax by at least 60%. If we don't, we will refund you any fees we have charged and complete the diagnostic period for you for free.

If you are worried about being beholden to one Government, losing your assets somehow and paying way too much tax in your business and personally, we promise that by following our methodology we can have a global strategy put in place in under 30 days to resolve this.

Our High Networth 60% Commitment is there for two reasons:

1. To transfer the risk of you working with someone new onto us.
2. To push us to work as hard as we must to keep this commitment to you.

WE ADVISE CLIENTS OF HIGH PEDIGREE INSTITUTIONS SUCH AS

GUGGENHEIM

J.P.Morgan BARCLAYS

BORDIER & CIE
BANQUIERS PRIVÉS DEPUIS 1844

Deltec Bank HSBC

TESTIMONIALS

Ross was the best consultant I could find! Very reliable, precise, fast and always open to give useful advices. On top of that he's very friendly which added value to the whole experience. I will definitely hire him again in the future.

International DJ

Ross has been highly professional, efficient and confidential, helping to resolve our needed tasks. The relation was always very personal, trustfull and reliable. He's very friendly and respectful in his communication and easy to do business with. It really has been a pleasure. We will always come back to Ross for potential support.

German Eco-Entrepreneur

Ross was a pleasure to work with & knows his stuff. All our questions where thoroughly researched & well answered in a timely manner. Highly receommended.

New Zealand Family Immigrating to Switzerland

Ross is highly knowledgeable in financial compliance law and procedures both from a theoretical perspective and in practical implementation. He has a keen business sense and always provided sensible and value-for-money guidance and suggestions.

South African Tech Entrepreneur

I recently had the pleasure of working with (Belhomme Law) on a legal matter, and I cannot recommend (them) highly enough. (Their) knowledge and expertise are truly impressive, and (they) always went above and beyond to ensure that I received the best possible outcome. What stood out to me the most was Ross's professionalism and dedication to his clients. He took the time to explain everything clearly and patiently, and he was always available to answer any questions I had. His kindness and compassion also made a difficult situation much easier to navigate. Overall, I am extremely grateful for Ross's services and would recommend him to anyone seeking legal counsel. Thank you, Ross, for your hard work and for making a positive difference in my life.

Zurich/US-Based Entrepreneur

FREQUENTLY ASKED QUESTIONS

What if you are not experts in my country?

We are global advisors. The principles and our methodology work for every country worldwide and we have the skillset, network, and experience in order to execute globally.

We have completed recent work with tax and legal aspects in French Guyana, Peru and Papua New Guinea for example.

What languages do you speak?

We only work in English.

We do have Swiss German, High German and French language capability in order to deal with authorities in Switzerland but we do not work in these languages.

Where can we meet and where are your offices?

We do like to meet within 6 months of working together. We can meet in our offices in Geneva and Zurich in Switzerland or we are often in places such as Toronto, Miami, New York, London, Dubai, Singapore, Hong Kong and the Bahamas during the year.

How can I verify who you are and your credentials?

We have a strong public profile with zero negative impressions on the internet. We can also provide references from well-known bankers, lawyers and other well-regarded individuals in various jurisdictions.

Can I just ask you questions as I need and what if I just need to chat on an ad-hoc basis?

We are not jack-or-all-trades lawyers but we do have long-term clients who we are in almost more of a legal coaching relationship who are happy to buy our time at our hourly rates. This is possible here: **https://www.belhommelaw.com/single-sessions**

Can I not just implement this all myself?

In our experience it's not very fruitful or very fun to work with clients who are advisor shopping or answer shopping constantly so if you like to work that way, we would not want to engage with you.

How long does it take?

Usually our clients are coming to us because they have a pressing issue. We can have the diagnostic done in 10 days, and implementation can be done in under 30 days if it is straight-forward. Opening banking relationships takes longer, often up to two to six months depending on the jurisdiction.

What if I don't like the report output?

We will communicate with you.

Can we meet in-person?

Yes!

Is Switzerland your main expertise given you are headquartered there?

Naturally as we are headquartered in Switzerland, our clients often come to us because of that and with an expectation that we understand Switzerland well. And we do.

What if I already have over advisors?

That is fine, but you need to be clear why you are appointing us. It is likely because you feel there is a gap in your current advisory team and there is something you don't know. We don't work with clients who just hire multiple advisors without any clear reasoning as often it can create confusion, especially for the client. We do ourselves work with external advisors, and often this is part of the package and budget we will agree with you. So we can work with any key advisors you may already have.

What are your prices and are they negotitable?

We charge a fixed fee of CHF3,500 (VAT if applicable) for the initial work. Either you can pay this fully upfront or you can pay CHF1,750 upfront and another CHF1,750 just before delivery of the report.

For the implementation part we will discuss and agree an appropriate fixed budget for the scope of work required.

Do I have to pay the fees all upfront?

Normally yes and most clients prefer to do just do this, but for the initial diagnostic we ask for 50% before we begin with the final 50% payable on delivery which we think is fair to both parties and ensures our clients engage in the process fully.

PRICING

Initial Diagnostic: CHF3,500

Find Out More and Book A Call at www.belhommelaw.com

Visit our website www.belhommelaw.com for more information and FAQs.

Ross Belhomme

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