

# EXPATRIATE TAX SERVICES



“It is critical to work with professionals who specialize in these complicated taxes. You could be leaving money on the table or violating compliance requirements.”

We help U.S. nationals on foreign assignment, foreign individuals working in the U.S., and companies with employees working abroad navigate and make sense of complex and ever evolving expatriate tax laws. We don't simply put numbers in boxes, we review your return knowing your goals to alert you to opportunities to get the results you're looking for within the tax laws. We work with you to know what your goals are for the future to help you reach them sooner.

## SERVICES WE OFFER:

- FBAR Filing & Compliance
- Foreign Tax Credit Planning
- Individual Tax Compliance
- Repatriation/Expatriate Planning
- State & Local Tax Compliance
- Tax Equalization Analysis & Planning
- Tax Minimization Planning
- Exit Strategies: Planning & Valuation

A U.S. taxpayer gets their taxes done by a typical preparer who may not understand the benefits available with the foreign tax credits. The preparer may not have the experience needed or understand the complexity of this type of return and can miss credits or exclusion that can result in overpaying income taxes. Those working on rigs are especially susceptible to these types of complicated tax returns.

For someone living and working abroad, giving up a green card might seem like an attractive option, especially if they are tired of filing U.S. taxes. However, there are many factors to consider included an exit tax which may apply, being subject to withholding on U.S. sourced income because they won't have a U.S. social security number, and if they decide they want a green card again, they will need to begin the process again from the beginning without priority. Our goal is to help clients understand the options.



## WHY CALVETTI FERGUSON?

For inpats who have not prepared a U.S. tax return before or expats not sure what to file, the process can seem daunting, but our team helps our clients get comfortable with the process as we make it seamless and easy to provide the necessary documentation.

We have the capability to deliver the tax returns electronically to our clients and to the government to make the process as simple as possible for our clients. Not all tax professionals are experienced and knowledgeable in expatriate taxes; however, our team of tax professionals stay up to date on continually changing tax laws to help our clients navigate complex tax regulations by offering tax planning, optimization, and compliance services.