

An In-Depth Look At The New Australian Tax Residency Rules

How To Use Your International Status To Minimise The Tax You Pay

Zoom Webinar

Thursday 1st July, 6:00pm Sydney NSW

During the recent budget delivered on 11 May 2021, Australia's federal treasurer, Josh Frydenberg, announced that Australia will replace its tax residency rules for individuals with a so-called 'bright line' test. The changes will be based on a Board of Taxation report issued in March 2019 in which a range of new tests were proposed.

If you are an Australian International working in Asia with combined assets over AUS \$500,000

Find out how to reduce the tax you pay

The key questions that Australian expats need to consider whilst working in Asia are 'how will these new rules apply to me?' and 'what actions could I take to reduce and my future tax liabilities in Australia?'.

In our latest webinar, we will delve deeper into:

- The New Australian Tax Residency Rules
- What is the so-called 'bright line' test?
- How you can use your international status to reduce the tax you pay
- Finding the best investment vehicle for your unique circumstances
- How high earners can benefit from changes to the tax system
- The minimum time you must hold these investments to qualify
- Protecting your investment gains when you choose to return home

[CLICK HERE TO REGISTER YOUR PLACE](#)

Any questions? Contact Charlotte.Downs@skyboundwealth.com



Your Hosts



Ryan Donaldson

Chartered MCSI
From Geneva

Regional Manager and Senior Financial Planner

Having worked in numerous locations around the world, Ryan has first-hand experience of how to best support international investors with financial planning advice and security on a domestic and international level. Ryan creates and implements comprehensive financial plans designed to ensure your long-term ambitions become a reality and your future lifestyle is protected.



Geoff Taylor

MBA CPA
From Sydney

Partner and Australian Tax Expert

Geoff is one of Australia's leading expat tax and financial planning advisers. He regularly delivers Keynote addresses and has assisted many expats during their repatriation to Australia. A dual qualified Tax Accountant and Financial Planner, Geoff has developed specialised expertise in advising Australian expatriates over the last 14 years.

Income in Retirement: An International Perspective

Webinar 20th October, 6pm EST

SAVE YOUR SEAT TODAY

In this webinar, our experts will be exploring how you draw income in retirement from your assets across the globe, including what is the best drawdown strategy for your current plans.

Reserve your place now to understand:

- Sequence of Distributions
- Income Sources in Retirement
- UK and US State Pensions
- Putting it into perspective : A Case Study
- Estate & Legacy Planning
- Objectives clients will get from this : Understanding their international investment accounts, and how to structure them for efficient retirement income planning, and how to potentially reduce estate tax exposures.

SAVE YOUR SEAT TODAY

Disclaimer

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Daniel Mesa
Financial Advisor

Daniel's solution-oriented and responsive style is well-suited to assisting international investors to achieve their financial goals. Daniel takes pride in working with clients, big or small, to not only navigate the situation, but set them up for the long term.



Nicolas Mauricio
Financial Advisor

Nicholas has a strong knowledge base and is always striving to provide his clients with the finest experience possible in financial planning. Originally from San Antonio, Texas Nicolas is now based in Miami and well placed to work with current and new clients across the US.



Michael Jordan
Financial Advisor

In the UK, he is a qualified member of the Personal Finance Society. Michael specialises in helping resident British Expats and people with UK work history with pension planning and Holistic Financial Advice.

Now based in Miami, he is best placed as an expat himself to help guide his clients through the potential pitfalls of international financial red tape and regulation.

A UK/US CASE STUDY

Introduction to International Financial Planning

Zoom Webinar

Thursday 26th August - 2:00pm EST

Taking Control Of Your UK Assets Whilst Living In The US

How Skybound Can Help UK Connected Individuals In The US To Successfully Navigate Their Finances

As a US Resident with UK-based assets, keeping tabs on your investments is a task in itself. By attending our webinar, you'll learn about the complexities that can arise with international tax considerations and in so doing, be in a better position to plan your retirement and your estate.

Register for our exclusive webinar now to understand why you should connect and aggregate all your financial accounts, and how to:

- Maximise the tax efficiency on your estate
- Get the optimum return from your 401(K)
- Ensure you remain on track with regular reviews with your advisor
- Establish your hopes and aspirations for the future
- Harness all of the above and create a tailor-made plan that helps you achieve your retirement goals

Introducing 'My Portal'

Online access to the most recent valuations for your accounts in the palm of your hand. A true financial planning solution for international executives.

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Dominic Kay

Paraplanner

Dominic is a technically driven professional whose prior expertise in dealing with sophisticated/HNW and internationally mobile clients enables him to provide clients with valuable insights and unique strategies on matters such as; repatriation planning, estate tax planning & gifting and complex pension planning and LTA mitigation.

Daniel and Nicolas will be on hand to answer any questions you may have throughout the webinar, and you can send through your questions in advance by either emailing – dominic.kay@skyboundwealthusa.com or completing the registration form

Irish Pension Changes

Use Your Expat Status To Reduce The Tax You Pay On Your Pension

Webinar Monday 24th May, 6pm UAE, 4pm CET, 3pm IST

If you have any unanswered questions about your Irish pension or would you like to know more about the taxes, regulations and laws surrounding it, then look no further than our latest webinar, Irish Pension Changes.

This exclusive webinar will cover:

- Understanding your pension, now, when you retire, and after you die.
- The taxes which you may not realise that you are going to pay, and the restrictions to your retirement income, because you are overseas.
- What happens to your company pension, if your former employer can't pay? How much of your pension is protected?
- How EU regulation, a 2003 law, and a Dublin court case affect your choices. The role that Malta plays in this.
- How Irish/British agreements and a 2015 UK law can help you access your pension money tax free. Will this opportunity be available for much longer?
- Why now is the best time to check your options.
- How professional advisers can work together to achieve the best results, in this case, an IFA in Dublin, and International Financial Planners based in Dubai.

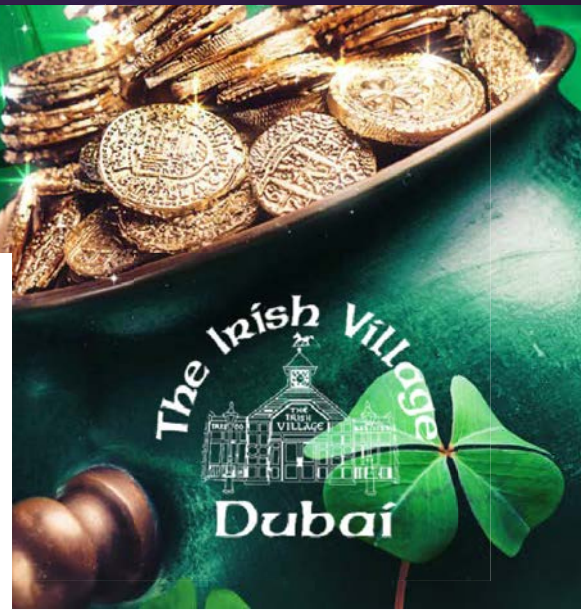
Irish Pensions Changes will be held by Skybound's senior financial planners, Helen Morris and John Sharp.

They will be joined by Johnny Mulholland, a pension specialist, based in Dublin.

[CLICK HERE TO REGISTER](#)



* For our participants based in the UAE, we are pleased to provide a voucher for a pie and a beverage from The Irish Village, since we cannot gather in person for this event due to COVID restrictions. This voucher will be provided after successful completion of our online details form.



Helen Morris *MCSI, Cert Pfs*
Senior Financial Planner

Helen is a Chartered MCSI of the Chartered Institute for Securities & Investments and an associate of the Personal Finance Society (Cert Pfs).

She has been an Independent Financial Adviser for investments & pensions since 2000, in the UK, UAE & Sri Lanka, successfully supporting clients from capital growth to comfortable retirements worldwide.



John Sharp *Bsc(Hons), DipPFS, EFA*
Senior Financial Planner

John has advised clients on pensions and investments since 1995, in the UK, Jersey and the Middle East. John moved from Jersey to Bahrain in 2017, then to Dubai in 2018.

In the UK, John specialised in pension advice for the Prudential, having previously worked as both an Independent Financial Adviser and for several blue-chip pension and investment companies.



Johnny Mulholland
Director of International Pension Transfer Consultants Ltd

Director of International Pension Transfer Consultants Limited, Johnny works closely with professional advisors and their clients in relation to tax efficient pension products across the European Union.

Johnny has a unique understanding of the intricacies around transferring Irish Pensions to overseas jurisdictions and has helped clients and other advisers to transfer Irish Pensions to the UK, parts of Europe as well as Australia.



ONLINE EVENT THURSDAY 15TH JULY

THE LATE TACKLE

WITH

DAWSON AND BURGER

*Talking All Things
Lions Tour*

An evening filled to the brim with rugby tales from two icons of the modern game, Matt Dawson & Schalk Burger

Zoom Online Event - Thurs 15th July
6:00pm UK, 7:00pm CET/South Africa, 9:00pm GCC

As South Africa gets ready to host the first test of the British and Irish Lions tour in Cape Town, we invite you to log on for a truly unique insight into the world of rugby union from both sides of the battle line with two of the sport's biggest personalities.

DON'T MISS THIS EAGERLY ANTICIPATED ONLINE EVENT

Our very special guests will take you on a virtual journey through their glittering careers and a candid look at their predictions for the upcoming Lions tour. So, pour yourselves an ice-cold beverage, set your diary to do not disturb, sit back, relax and listen....

WE EXPECT THIS EVENT TO BE OVERSUBSCRIBED, SO BOOK YOUR PLACE NOW!

[CLICK HERE TO REGISTER](#)

Matt Dawson

2003 Rugby World Cup winner, 77 caps for England (9 as captain), 7 caps for Lions including series win in South Africa in 1997

Regarded as one of the game's more outspoken players, Matt Dawson represented the British and Irish Lions on three tours, scoring a famous try in the first test against South Africa in Cape Town in 1997, the team winning that and the second test in Durban for a series victory. Since hanging up his boots, Matt has carved out a successful media career, including becoming the longest serving team captain on 'A Question of Sport', winning a celebrity edition of Masterchef and finishing second in Strictly Come Dancing.

Schalk Burger

2007 Rugby World Cup winner, 86 caps for South Africa, series win against British and Irish Lions in 2009

Schalk's father, also Schalk, played for the Springboks six times in the 1980s and it was clear from an early age that sport would play a significant role in Schalk Junior's life. He held a professional cricket contract before turning his attention to rugby and, in his first full season as an international (2004) was named the IRB's World Player of the Year. In 2015, after being part of the Springboks' World Cup squad, he received the Laureus Comeback of the Year award, having recovered from a life-threatening illness to play at international level again.

Open Q&A Forum

A lively discussion and debate is expected. To allow us to get through as much as possible, we would ask that you send your questions in advance by email to webinars@skyboundwealth.com

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YOUR HOST

Matt Pearce

Matt is the anchor rugby commentator and presenter for the Supersport channel in South Africa and a three-time SA TV commentator of the year award winner. He has commented on more than 100 Springbok test matches, including the last three Rugby World Cups and the 2009 series against the British and Irish Lions. He will be providing the Supersport and world feed anchor commentary on the Lions series this year.

Win A Signed Lions Shirt

Everyone who signs up to the event will be automatically entered into a prize draw for the chance to win a Lions Shirt signed by Warren Gatland.

The winner will be contacted by telephone shortly after, so please ensure all contact details are correct when booking your place.



Register Your Attendance For Your Chance To

Win A Lions Shirt, Signed By Head Coach Warren Gatland

Signed by the man who won a series in Australia, drew a series in New Zealand and now gets a crack at the Springboks



Will We Get A Fourth Quarter Growth Spurt?

Webinar

Wednesday 15th September - 10:00am EST

As a valued client, we would like to invite you to participate in a live Conference call with Optimus Capital's CEO & CIO, Martin Newson.

Martin will be addressing one of the most pressing questions on everybody's lips; will we get a fourth quarter growth spurt?

What factors will play a part and how a fourth quarter growth spurt will affect your long term investments. Plus, how will this drive investment strategies, while reaffirming the importance of holding a diverse portfolio, that attempts to both protect your wealth and take advantage of what lies ahead.

At the close of the session, Martin will also host a live Q&A. This will be a fantastic opportunity to put your questions to one of the industry's most experienced and key investment figures.

Optimus Capital specialises in asset management; delivering highly sophisticated investment solutions to both private and institutional clients.

10am EST - Wednesday 15th September

Join the webinar using the link and password below:

<https://us06web.zoom.us/j/82040652292?pwd=eEZaNWhpYk9SQTNqaXBmekZyd0MyUT09>

Passcode: 796074

If you have any specific questions for Martin, please submit them ahead of the call to jennifer.vega@skyboundwealthusa.com



Martin Newson

CEO & CIO Optimus Capital

Martin Newson was formally a number one ranked analyst at Goldman Sachs and a member of its European Stock Selection Committee. He has also run large equity divisions of major investment banks both in London and New York. As CEO & CIO, Martin chairs the Optimus Investment Committee.

Disclaimer

This information expressed on the conference call are the opinions of Skybound Wealth Management and Martin Newson, and are provided to you for informational purposes only. No guarantees are offered that the information presented will guarantee results. Investing involves risk including the loss of principal. No strategy can fully protect against market fluctuations.



The London Resort - A Unique Investment Opportunity

Zoom Webinar

Monday April 19 at - 13:00 CET, 15:00 UAE

If you're looking to add property to your investment portfolio then look no further than the London Resort.

In this exclusive webinar you will find out how this unique opportunity could be the cherry on top of your investment portfolio.

The multi-billion-pound London Paramount Entertainment Resort will include a theme park, waterpark, events spaces, hotels plus other infrastructure.

With a rolling 2.1 million square metres and an expected ROI that could reach 10.8 percent, the London Resort makes a desirable asset to any investment portfolio.

This webinar will cover:

- **Minimum 8% uncapped rental return guaranteed for first 3 years**
- **Fully managed hands-free investment: Prices starting from £370,000**
17 Minutes from Central London accessible via rail, road and water
- **Nationally Significant Infrastructure Project**
- **998 Years Lease hold, Completion Q2 2024**

Don't miss out on this unique webinar, register your interest today!

CLICK HERE TO REGISTER

or RSVP by emailing property@skyboundwealth.com
or call Hiren for more info on +971 4450 9700 Ext: 9786



Hiren Naker

Property Specialist

Hiren Naker is an experienced property specialist with over ten years of industry knowledge.

Since 2010, he has helped clients achieve their financial goals by assisting them with retirement and children's education needs, as well as helping clients achieve their goals of buying properties and paying off mortgages.



Jake El Rasoul

**Managing Partner -
Global Residential**

Jake has been based in the Middle East for the past 7 years, assisting overseas investors with purchasing, manage and selling both residential and commercial properties.



James Hayward

**Investment Director -
Farrbury Capital**

London based investment director specialising in the fractional and institutional disposal of residential and commercial assets, with a vast experience of Hotel Investments.



Are You Thinking About Retiring To Spain Or Portugal?

Protect Your Wealth And Create A Tax Efficient Income When Retiring In Europe

Zoom Webinar

Monday 23rd August, 6:00pm CET

As an international worker, where you retire can be just as important as when you retire.

In this webinar, we focus on two popular European jurisdictions that provide international workers with a unique opportunity to create a flexible and tax efficient retirement plan that can secure your family's future for generations to come.

Register now to understand how:

- Forward planning can help you preserve and protect your wealth and pass on significantly more to your loved ones
- Overseas pensions can simplify the practical and administrative difficulties of international wealth planning
- To mitigate the impact of wealth taxes
- To generate a tax efficient income when relocating to Spain and Portugal
- To enjoy the flexibility of choosing how and when you draw your retirement benefits

The webinar will be hosted by Will van der Lande, who will be joined by Fiduciary Specialist Ryan Levy.

[CLICK HERE TO REGISTER](#)



Will van der Lande

Senior Financial Planner

Will is a trained Macroeconomist and British qualified Chartered Accountant. With many years at the global consulting firm PwC, he brings a wealth of finance and international experience, having also worked around the world in the UK, Europe, New Zealand, and the Pacific Islands.



Ryan Levy

Fiduciary Specialist

Ryan is certified in International Trust Management through STEP, holds a BCom in Financial Management and has extensive experience advising clients on international pensions and investments.

Retirement And Legacy: Is Your Inheritance Tax Optimized?

In conversation with Tom Pewtress
and Richard Cawley

Zoom Webinar Tuesday 29th June, 6.00pm UAE

Inheritance tax planning is crucial to later life organisation, which is why it's vital to take control now. Are you optimising your inheritance tax?

- Do you know your beneficiaries' liabilities?
- Can your retirement fund be generational?
- How will inheritance tax impact you?

This exclusive webinar will provide answers to the questions above whilst also covering important topics such as:

- IHT Implications on your pension
- Are the spousal and next of kin benefits of DB schemes sufficient?
- Have you nominated your beneficiaries? If not, what is the process of naming your beneficiaries

Our latest webinar will be held by Skybound's UAE Regional Manager and Senior Financial Planner Tom Pewtress and Pension Specialist Richard Cawley. Together they bring a wealth of knowledge to the table to ensure they can answer any queries you have regarding inheritance tax.

To register click the link below. We look forward to seeing you there.

[CLICK HERE TO REGISTER YOUR PLACE](#)

Any questions? Contact Sean.Connolly@skyboundwealth.com



Your Hosts



Tom Pewtress

Live from UAE

**UAE Regional Manager
and Senior Financial Planner**

A dynamic international Financial Adviser who has spent many years providing cross border advice to expats, focussing on holistic financial planning across different jurisdictions. Tom works alongside international workers like you to create and implement a comprehensive plan designed to ensure your long-term goals become a reality and your future lifestyle is protected.



Richard Cawley

Live From UAE

Pension Specialist

Richard has a UK Pension Planning background and now provides analysis and advice on an international basis. With numerous financial qualifications including his Diploma in Regulated Financial Planning, his certificate in Discretionary Investment Management and his certificate in Pension Transfer Advice, he is well positioned to provide technical analysis to Tom's clients.

Getting To Grips With Your UK & Swiss Pensions.

Webinar 21st October, 6pm CET

Whilst Switzerland remains a firm favourite for British expats, the changing landscape has made international financial planning more challenging than ever before.

SAVE YOUR SEAT TODAY

In this webinar, our experts will be exploring some of the nuances of both the UK & Swiss pension systems. They will be sharing some ideas to help clients plan effectively for their futures and optimise their pensions both to and through retirement.

Reserve your place now to understand:

- Your entitlements from the UK & Swiss pension system. You will be provided with practical tools and tips to help you know what you currently have and what you can expect to receive.
- Whether you may be eligible and if it may be suitable to transfer your UK pension to Switzerland tax – free.
- How to drawdown from your UK and Swiss pensions in the most tax efficient manner
- How best to utilise your pensions so that you can maximise your estate for inheritance tax purposes

The webinar will be hosted by Skybound's Pension Manager and Chartered Financial Planner, Carla Smart. She will be joined by Mike McCoy, Director, Global Mobility at KPMG Switzerland, who is an experienced tax professional that specialises in cross border taxation between the UK and Switzerland.

SAVE YOUR SEAT TODAY



Carla Smart

Pensions Manager & Chartered Financial Planner

Carla has spent over a decade helping expatriates to manage their finances effectively, and has been learning, to some extent first hand, of some of the challenges faced when living abroad. In particular, she has extensive knowledge of the interplay between the UK, French and Swiss systems, having lived and worked in each of these countries.



Mike McCoy

Director, Global Mobility, KPMG

Mike McCoy is a Director for Tax & Legal who works closely with global companies on their workforce strategy, bringing together a wide range of expertise including cross-border tax, legal and strategy. He has over 16 years' experience in Global Mobility with a background that includes connected tax and advisory projects on topics spanning international pensions, equity design and implementation, Global Mobility transformation, organizational design and workforce optimization. .



Successfully Repatriate Your Swiss Assets Back To The UK

Webinar Thursday 30th September, 6pm CET

Moving your Swiss based assets and savings to the UK can be a confusing task. Before you head home, there are a number of simple yet vital steps which you must take in order to provide yourself the best structure for financial life back in the UK.

In this webinar, we will explain how you can take advantage of your international status to help best structure your future income when returning to the UK.

The webinar will cover various assets types and how these should be structured to generate an income as well family inheritance planning back in the UK.

Reserve your place now to understand the difference between residence and domicile and how this can affect your tax status between Switzerland and UK, and learn how to:

- Take your Swiss savings, investments and bank accounts home with you
- Structure a tax efficient income back in the UK from your Swiss savings
- Mitigate inheritance taxes and understand what falls into your estate
- Maximize your retirement and structure your income to your personal circumstances
- Understand how you can provide yourself with the most tax efficient structure for the future

Successfully Repatriate Your Swiss Assets Back To The UK will be hosted by Skybound's financial planners, Chris Bowler.

They will be joined by Damian Woodcock, an experienced tax professional and Neil, who has also developed a niche in advising on tax issues associated with both UK and overseas pension schemes.

[CLICK HERE TO REGISTER](#)



Chris Bowler

Financial Planner

Christopher JR Bowler is an experienced and driven international financial and lifestyle adviser who helps international clients with all aspect of their financial planning whilst they are living and working overseas.



Damian Woodcock

Tax Professional

Damian is an experienced tax professional with a comprehensive knowledge of all aspects of personal taxation including Capital Gains Tax, Inheritance Tax and Residence & Domicile.



Neil Byrne

Tax Professional

Having started his career in taxation with HM Revenue & Customs in 1991, Neil is experienced in all areas of personal taxation and has developed a niche in advising on tax issues associated with both UK and overseas pension schemes.



US/UK Tax Compliance & Planning Webinar

Webinar

Wednesday 17th March - 10:00am EST

It's Tax Season! Have you got your finances in order?

We would like to invite you to participate in our latest live webinar with International Tax Consultant, James Cassidy.

The webinar will be hosted by US Regional Manager, Nathan Tarr, with James Cassidy as our guest speaker. This latest webinar will focus on providing helpful information that may assist you in meeting your tax filing obligations.

Topics covered will include:

- Overview of US Tax Rules
- US Taxation of Foreign Investments and Businesses
- US & UK Real Estate
- Reporting of Foreign Pension Plans and Financial Assets
- US Gift and Estate Tax Issues
- Tax Planning for US Residents
- Wealth Preservation Planning – Contributing Assets to a Foreign Pension Plan

At the close of the session, James will also host a live Q&A. This will be a fantastic opportunity to put your questions who we believe to be one of the industry's most knowledgeable figures.

If you have any specific questions for James, please submit them ahead of the call to jennifer.vega@skyboundwealthusa.com

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James Cassidy

International Tax Consultant

James has a understanding of tax compliance, research & planning strategies for individuals dealing with cross border tax obligations.

As an expat growing up in two cultures, James took a special interest in the challenges faced by individuals & businesses crossing borders. He has spent his entire career dedicated to international tax concerns for expatriates.

Disclaimer

Advisory services in the United States are offered and provided through Beacon Global Advisor Network, LLC, a registered investment adviser. Registration as an investment adviser does not imply a certain level of skill or training and does not imply endorsement by the Securities and Exchange Commission (SEC) or any state. No promises or guarantees are offered that you will attain your financial or investment goals or objectives.

This information expressed on the conference call are the opinions of Skybound Wealth Management and James Cassidy, and are provided to you for informational purposes only.

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Self-Confidence Is Your Biggest Gold Mine

Zoom Webinar

Wednesday 10th February - 5:30pm CET

Are you ready to take on the world with more energy and determination? Do you want to become more independent on a financial and personal level?

Our webinar will show you how to do just that.

The webinar is hosted by Taylor Condon, Financial Planner at Skybound Wealth Management and Founder of the Women Like Us Network.

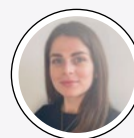
Our aim is to empower women's independence not only financially, but on a personal level too, which is why for our upcoming webinar we are working in conjunction with one of Europe's top professional coach and speakers, Barbara Roux-Levrat.

We'd love nothing more than to meet you in person but with the current restrictions in place, we must connect online for now. So pour yourself a cup of tea and log on!

[CLICK HERE TO REGISTER - 5:30pm CET](#)

[CLICK HERE TO FIND OUT MORE](#)

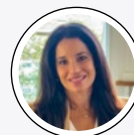
or RSVP by emailing taylor.condon@skyboundwealth.com
or call Taylor on +41 (0) 2251 80286 Ext: 2411



Taylor Condon

Financial Planner

Taylor is passionate about empowering women to build dynamic, professional, and meaningful connections with each other. Using her experience and knowledge, Taylor works alongside you to create and implement a comprehensive future life plan.



Barbara Roux-Levrat

Life Coach

Barbara is an expert in teaching women who are "too nice" how to become kick-ass! She is deeply convinced that most women are often too nice and try to please everyone around them while forgetting themselves in the process.