



Due to ongoing uncertainty in various political, regulatory, and economic environments, affluent individuals and families across the world are turning their attention to diversification not only through investment migration but also through where they purposefully choose to live and conduct business in order to protect their lifestyles and preserve wealth for future generations.

The Global Financial Planning Essentials certificate program covers the fundamental principles and strategies of international financial planning. It aims to equip financial professionals with the essential knowledge and skills necessary to navigate the complexities of cross-border financial planning.

Developed by the Global Financial Planning Institute and powered by the Investments & Wealth Institute, the curriculum combines a best-in-class learning experience with practical takeaways that can be applied immediately to add value for individuals and families across the globe.

PROGRAM LEARNING OBJECTIVES

- Interpret the general approach to international planning, define inbound planning, outbound planning, and cross-border planning, and identify how each is distinct from domestic planning.
- Implement the international and cross-border fact-finding process, including the importance of time and location in regard to prior and planned employment, business ownership, assets, and earned entitlements.
- Understand the legal, tax, and estate issues in residency, including residency-based vs. citizenship-based taxation and interactions of residency status, source of income, and taxation.
- Define a Passive Foreign Investment Company (PFICS), how they are taxed, and how to invest while avoiding PFIC status.
- Review US foreign tax reporting obligations, FBAR, FATCA, and the required forms.
- Understand foreign exchange, liability matching, taxation, and risk management.
- Understand issues related to Social Security for American expats.
- Understand the management of a multi-jurisdictional portfolio, how to invest a foreign portfolio to avoid PFIC classification, the compliance issues related to cross-border ownership of mutual funds and ETFs, and the role of the Key Investor Information Document.
- Understand the cross-border role of life insurance and disability insurance, including issues related to paying premiums while a non-resident, making a claim, and the taxation of death benefits while abroad.
- Understand cross-border education planning opportunities and issues.

MODULES

Module 1 - Intro to International and Cross-Border Planning

Module 2 - Tax and Immigration Planning

Module 3 - Investments, Retirement, and Other Planning Considerations

COURSE FORMAT

Program Type: Certificate program

Program Complexity Level: Intermediate

COURSE CONTRIBUTORS



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REGISTRATION & FEES

Basic Member	\$995 USD
Signature Member	\$746.25 USD
Elite Member	\$597 USD



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