



# RBC International Wealth Planning

Providing international tax consultancy & UK tax compliance  
for our private clients, their companies and their trusts



**Founded in 1864, RBC is Canada's largest bank and one of the world's premier diversified financial services companies.**

RBC is a financially solid and strong organisation with a strong balance sheet and a strong credit rating. The bank's consolidated operations have been consistently profitable for many years with an AA- rating by Standard & Poors and an AA rating by both Fitch and DBRS® (Dominion Bond Rating Service).

RBC's international wealth management operation serves high net worth individuals and niche institutional clients in select markets around the world. Client solutions include international trust and estate planning, discretionary investment management, full brokerage service, alternative investments, private banking and credit services and global custody and fund administration.

Our offices are located in regions recognised for the flexibility and security they provide our clients and for the integrity of their financial and regulatory systems.

**RBC Wealth Management provides the following services:**

- Banking and credit services
- International trust and estate planning
- Discretionary Investment Management
- Advisory Investment Management
- Alternative Investments
- Global Custody and fund administration
- Tax Consultancy.

## RBC International Wealth Planning

RBC International Wealth Planning is a specialist international private client tax consultancy based in Cheltenham and London.

We can provide international tax consultancy and UK tax compliance services to help you meet your own, and where appropriate, your family's, short, medium and long-term financial objectives. We are also able to assist you in creating the right structure to hold and manage your wealth.

## Our Approach

At RBC International Wealth Planning we use our experience and our global team of experts to:

- Create financial solutions based on your situation and tailored to your specific needs including international trusts, tax, wealth management and structured solutions
- Deliver advice that is timely and technically sound according to current legislation
- Explain complex tax issues clearly and without jargon.

We will discuss with you, and if appropriate your other advisors, all of your relevant circumstances and requirements. We will then carefully tailor our advice and offer solutions that are most suitable for you and your family, taking into account the longer term consequences.

If your tax affairs are international, we will liaise with foreign tax advisors and collate their advice with ours in order to present you with a comprehensive global solution.



## International Tax Consultancy

We can give tax advice on a wide range of issues affecting you, your family, trust or company including:

- Tax efficient investments and suitable structures
- Strategic wealth planning
- Retirement and succession planning
- Estate planning
- Mitigating tax for non UK domiciliaries / residents
- UK and offshore trusts
- Receiving value from company employee incentive plans
- Maximising the benefits of international pension plans
- Mitigating income tax and capital gains tax
- Maximising the value from your company or your trust
- Minimising the tax payable on the sale of your company.

## UK Tax Compliance

We use our considerable experience in dealing with tax authorities to ensure that you suffer minimal stress and disruption to your affairs by:

- Preparing UK self-assessment tax returns for you, your trusts, partnerships and companies
- Preparing inheritance tax returns
- Calculating and advising on tax liabilities
- Preparing necessary claims and elections and submitting to the tax authorities
- Dealing with H.M. Revenue & Customs enquiries and investigations.

**RBC International Wealth Planning**

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