



AVOCATS EN DROIT FISCAL

# PERSONAL TAX

*Assistance in estate and income tax planning, international mobility and various tax filling obligations.*

## STRATEGY AND ESTATE MANAGEMENT

- **Transfer of professional and personal estate** (*implementation of the “Dutreil” agreement, assignment strategies, retirement*)
- **Tax and social situation of company managers**
- **Professional assets / holding company** (*wealth tax, gift and inheritance duties*)
- **Tax exemption regimes regarding income tax and wealth tax**
- **Stock-options and free shares in a French or international context**
- **Tax residence and reporting obligations** (*departure from/return to France, special expatriate tax regime*)
- **International tax planning** (*compliance with the international tax treaties, intervention of our foreign tax specialist correspondents, members of the Nexia International network*)
- **Gift and inheritance in a French and international context** (*assistance with our clients’ notaries*)
- **Tax treatment of the compensation for termination of employment contract / social mandate**

## ASSISTANCE IN YOUR REPORTING OBLIGATIONS

- **Income tax and property wealth tax** (*residents and non-residents*)
- **Profits from furnished rental activities**
- **Exit-tax** (*departure, follow-up and return*)
- **Tax regularization procedure for foreign assets**
- **Event-returns and annual returns for trustees**
- **Donation and inheritance tax return**

# S&A

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Independent member of

