

## INDIVIDUAL TAXATION

Strategy, management and Ongoing assistance

We study your overall situation to define an asset strategy and assist you in preparing your mandatory tax returns

### 1 • ASSET STRATEGY AND MANAGEMENT

- Personal and business **assets transfer** (*implementation of lock-up agreement Dutreil, sales and contributions, retirement*)
- **Social and tax contributions analysis** of the company executive's situation
- Analysis of **business assets / active holding companies**
- Analysis of various **tax exemption systems** for income tax and wealth tax
- Simulations of **financial consequences** of tax options
- Assistance in implementing **impatriate / expatriate** systems
- Management and optimisation of **stock options** and **free shares** in national and international environment
- Management of **tax domiciliation** and **formal requirements** (*leaving / returning to France*)
- **Asset strategy in international environment** (*application of international tax treaties, working together with Nexia International's members*)
- **Tax assistance** for gifts and inheritance in conjunction with our clients' notaries and solicitors
- **Tax assistance** during the termination of job contracts, company officer mandates, divorces, etc.

### 2 • ONGOING ASSISTANCE MANDATORY TAX RETURNS

- Income tax and **wealth tax returns** (*residents and non-residents*)
- **Exit tax** returns
- **Event-based trusts** and **annual** tax returns
- Regularisation of **international undeclared accounts** (*tax cost simulation, filing amended tax returns and following up the regularisation proceedings before the French tax authorities*)
- **Gifts and inheritance** tax returns



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