

Expatriate Services

The BDO Organization has been a national leader in accounting and tax services for the expatriate corporate executive and high net worth individuals for more than 90 years.

www.urishpopeck.com



We Can Help You

- Ease the Compliance Burden
- Improve Employee Morale
- Reduce Complaints
- Reduce Costs
- Improve Executive Mobility

The Services

- Executive Briefings
- Home & Host Country Tax Compliance
- Pre-Assignment Planning
- Social Security Advice
- Global Tax Minimization for Firm and Assignees
- Pension Advice
- Payroll Advice
- Tax Treaty Advice
- Tax Equalization and Protection
- Country Specific Planning by Network of Tax and SS Specialists

Compliance

Urish Popeck serves clients by leveraging a global distribution network of resources comprised of 600+ member firm offices in 100+ countries. The organization's expatriate tax professionals are able to rely on this vast network to work through differing tax laws and language issues. Compliance services offered include:

- U.S. Federal Tax Return Prep.
- State and Local Tax Return Prep.
- Extension Requests
- Estimated Tax Payment Analysis and Voucher Preparation
- Report of Foreign Bank Accounts
- Assistance with Inquiries from U.S. and Foreign Tax Authorities
- Foreign Tax Return Preparation
- Preparation of Foreign Estimated Tax Payments and Vouchers
- Coordination of U.S. and Foreign Tax Withholding Obligations

Consulting

The organization's expatriate tax professionals also consult on tax-effective compensation in the U.S. and throughout the world, assisting in developing compensation, relocation, and tax equalization policies, long-term pension and stock option plans, and, where required, payroll administration. Individual Assignee tax planning services also include:

- Pre-assignment consultations in the U.S.
- Post-arrival Consultations in Foreign Countries
- Submission of Residency Forms in Foreign Countries
- "Benefits in Kind" Planning
- Utilization of Tax Treaties
- Formulation of Tax Reimbursement Methodology
- Social Security Tax Planning
- Stock Option Planning
- Development/Modification of Tax Equalization Plans
- Development/Modification of Expatriation Policies

Alternative Business Strategies

The organization's expatriate tax services are characterized by a holistic approach to tax planning which, inter alia, means that the services provided the expatriate assignee are not segregated from considerations of the impact those services might have on the employer's tax efficiency and/or risks. The expatriate services team is informed by its daily involvement with the remainder of the national tax practice, which includes a full menu of Federal, State, and Local, and International tax professionals.

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Additionally, the expatriate services team is supported by a full-service benefits practice. The Compensation and Benefits practice offers comprehensive review and planning in the compensation area, including advice on all forms of retirement plans, quality-based compensation techniques, and welfare plans.

Administration

The following additional services are available to support the administration of your expatriate tax program:

- Preparation of Estimated Hypothetical Tax Calculation
- Preparation of Final Tax Reimbursement Calculation
- Preparation of Quarterly Tax Estimates for Employees
- Cash Flow Projections
- Assignment Cost Projections
- Assistance with Year End Payroll Reconciliation
- Full Range of Assignee Program Management Services
- Assignee Relocation Services

Payroll

The organization works closely with a variety of vendors to provide coordinated services.

Technology and Systems

State-of-the-art processing and communications technology is utilized, providing program managers all the data they require in a timely fashion. Assignees have use of electronic organizers and electronic filing.

Communication

State-of-the-art, web-based assignee program management and communications are employed. Through a combination of letters, emails, and telephone, the expatriate services team helps provide up-to-date data to assignees and managers, and regular reports to complement annual review meetings.

For more information, please contact Dominick Stinelli at 888.287.0335 or email dstinelli@urishpopeck.com