



## RSM PRIVATE CLIENT SERVICES – ACROSS THE WORLD

**THE POWER OF BEING UNDERSTOOD**  
AUDIT | TAX | CONSULTING





## RSM PRIVATE CLIENT SERVICES ACROSS THE WORLD

---

Whether it is for you, your family or your business, it is essential to take proactive steps to ensure your wealth is protected wherever it may be. The right support and advice are critical to achieving your personal wealth goals and ambitions.

The global wealth environment is constantly evolving, creating new opportunities to explore new risks to manage. If you have interests and family across multiple jurisdictions this will create additional complexities and an increased risk of non-compliance.

RSM Private Client Services, with the power of our RSM international network can support you throughout your wealth journey, helping you to preserve your assets for generations to come. Your dedicated RSM adviser works with you to understand your needs and will coordinate your domestic and international requirements across every jurisdiction – providing a truly borderless solution for your needs.

RSM Private Client Services are the foundation for your successful wealth journey.

---





---

## FOUNDATION OF THE WEALTH JOURNEY

At the start of your wealth journey, your focus will be on growing your wealth, your business and progressing your entrepreneurial endeavours. The pressures on your time can make dealing with routine but essential tasks challenging and distract you from your primary focus.

RSM Private Client Services can assess your current position and ensure you have a firm foundation with which to progress your wealth journey. These services include:

- Multi-jurisdictional income tax planning and compliance
  - A review of estate and succession planning and compliance
  - A review of succession and inheritance planning
-





## PROGRESSION OF THE WEALTH JOURNEY

As you continue on your wealth journey, you may be about to experience your first liquidity event (e.g. the sale of your business).

This is the perfect opportunity to reflect on your circumstances and evaluate what additional support you might need to assist with the increasing complexity of your situation.

Our advisers can help you undertake this task and provide additional support including:

- Estate and succession planning and compliance for multi-generational families
- Business ownership and management succession planning
- Governance and education
- Multiple family investment entities
- Owner-operator business structuring and planning

## EVOLUTION OF THE WEALTH JOURNEY

The continued evolution of your wealth will bring new opportunities and challenges to master. Whether you're a wealthy individual, family or family office, you should review your current provisions and structures to ensure they are fit for purpose and align to your future objectives.

RSM Private Client Services can assist with the ongoing maintenance and management of your needs with services including:

- Risk management review and consulting
- Technology data aggregation and reporting
- Financial wellness, education and planning
- Security, privacy and risk services
- Multiple trusts (grantor, irrevocable, intentionally defective, etc)
- Strategic philanthropy and non-profit planning
- Family office services including education and succession planning



Clients trust me to help  
them unlock opportunity by  
putting risk in the spotlight.



“

At RSM, we believe in giving clients more. More understanding. More expertise. More confidence.

”

## SENIOR EXPERTISE, IDEAS AND INSIGHTS

In a rapidly changing economic and business landscape, tax authorities are increasingly taking more strenuous measures to tax structuring.

With a move towards global sharing of financial information, it is important to operate well within the rules. The skill of our RSM Private Client Services advisers is to achieve this, whilst making wealth work for private clients in a way that is tailored to them and their lifestyle.

We believe that you deserve to have access to the invaluable knowledge of our most senior global professionals. To help you meet each new challenge armed with all the relevant ideas and insights, our RSM advisers share their expertise with pride and respond with speed and agility.

As the world sees increasing legislative changes, compliance and a rise in wealth, RSM's understanding and cross-border experience and global capability enables to deliver a market leading service to all our private clients.

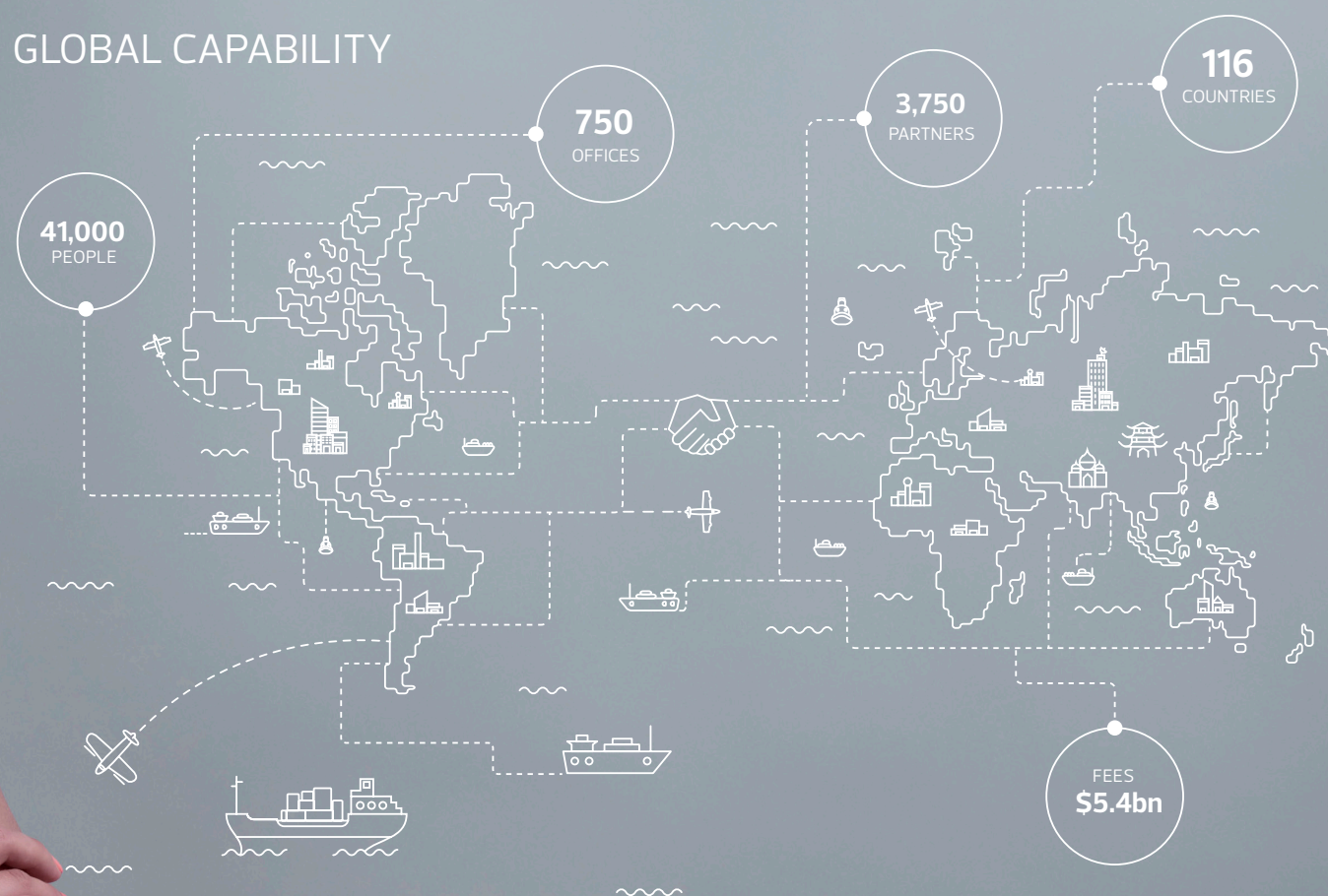
## UNDERSTANDING YOU AS A CLIENT

Our client relationships are based on mutual respect and collaboration. We will immerse ourselves in gaining a deeper understanding of who you are, what you believe in and what inspires you.





## GLOBAL CAPABILITY



## ABOUT RSM

In a powerful global network, RSM has audit, tax and consulting experts in offices all over the world.

Working as an integrated team, we share skills, insight and resources, as well as a client-centred approach that is based on a deep understanding of your requirements. This is how we empower you to move forward with confidence and realise your full potential.

This is The Power of Being Understood.

### Collaboration globally and locally

Wherever you are in the world, you'll be able access the same seamless service, combining astute local knowledge with the global expertise of our most senior professionals.

- 7<sup>th</sup> largest global audit, tax and consulting network
- Firms in 116 countries and in each of the top 40 major business centres throughout the world
- Over 41,000 colleagues across 750 offices globally

Through the power of the RSM international network we can support you and your family wherever your interests are located and empower you to look to the future with optimism and confidence.

To find out more about your local RSM firm visit **rsm.global**

Alternatively, contact the Global Executive Office at our London Headquarters for an immediate response.

We will put you in touch with the partner in one of our international offices who is best equipped to help with your enquiry.

**RSM Global Executive Office**

50 Cannon Street  
London EC4R 6JJ  
United Kingdom

T: +44 (0) 20 7601 1080

E: [Communications@rsm.global](mailto:Communications@rsm.global)

RSM is the trading name used by the members of the RSM network. Each member of the RSM network is an independent accounting and consulting firm each of which practices in its own right. The RSM network is not itself a separate legal entity of any description in any jurisdiction. The RSM network is administered by RSM International Limited, a company registered in England and Wales (company number 4040598) whose registered office is at 50 Cannon Street, London EC4R 6JJ. The brand and trademark RSM and other intellectual property rights used by members of the network are owned by RSM International Association, an association governed by article 60 et seq of the Civil Code of Switzerland whose seat is in Zug.

© RSM International Association, 2019

**THE POWER OF BEING UNDERSTOOD**  
AUDIT | TAX | CONSULTING

