



360-DEGREE PLANIFICATION REGARDING INHERITANCE & GIFT PLANNING

Often underestimated, the tax applicable to a gift or inheritance can, in some cases and without careful planning, reach up to 120% of the amount of the donation or inheritance. Added to this are the legal aspects, which can complicate or even prevent the transfer of assets to all the testamentary heirs.

Our services include

In order to provide our clients with the best possible advice, we offer them a one-to-one meeting, during which we take stock of their personal and financial situation and their needs. We offer the following advice on inheritance and donations:

1. Legal review – *Analysis of the legal aspects of an inheritance or donation*

- Preparation of an analysis of the client's current legal situation from an inheritance and/or gift point of view;
- Review of testamentary dispositions and verification of legal compliance or, alternatively, drafting of testamentary dispositions;
- Proposals for optimisation, points of attention and estate planning;
- Coordination with the notary if necessary (additional fee).

2. Tax review – *In-depth analysis of the tax implications of transfers by succession or donation and optimisation of the tax consequences*

- Review of the last tax return and analysis of the current tax situation (assets and property held, including real estate, share and bond portfolios, etc.);
- Tax planning and recommendation of strategies to minimise inheritance and gift tax liabilities;
- Coordination with RSM offices abroad in the case of an international succession or donation (fees for RSM offices not included);
- Analysis and estimation of potential estate and gift taxes.

CONTACT US!

Scan this QR code and Contact us directly on our website.



RSM | 6TH LARGEST ASSURANCE, TAX & CONSULTING NETWORK WORLDWIDE

120 countries connected, a consistent execution

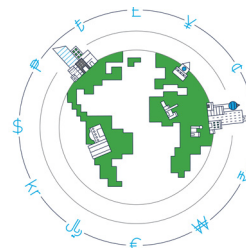
Whichever the country in which you operate may be, you have access to the whole RSM network. Our teams commit to the consistent quality of their projects in order to bring trust and security into your operations.

A unique contact point

We know that your time is precious. Your unique contact point at a high level is the relay of your needs at the heart of the network. It can make exchanges flow more smoothly, mobilise the local or international skills necessary whatever the destination of your ambitions may be.

A large range of skills

Together, we make our best skills, expertise and our sectorial knowledge available to you in order to help you reach your objectives. This expertise can help you enhance your business efficiency, reduce costs, control risks and become more competitive.



65,000+
People worldwide

900
Offices

120
Countries

OUR SERVICES

Accounting & Payroll

- Accounting
- Reporting set-up
- Salaries
- Invoicing
- Expatriates
- Secondment of personnel
- Back office management

Audit & Assurance

- Statutory and voluntary audits
- Donor and project audits
- Special and legislative audits
- Regulatory and AML audits
- Equal Pay Certification
- Internal audits

Consulting

- Strategy
- Commercial
- Restructuring
- Risk analysis and consulting

Corporate Finance & Deal Advisory

- Transaction advice
- M&A
- Due diligence
- Fundraising
- MBO / MBI

IT & Risk Advisory

- IT audit
- IT risk
- IT security & privacy
- Business risk
- CyberShield Academy
- Data analytics
- Digital transformation
- Green IT

Tax, Legal & GES

- Corporate & Real estate tax
- Private client services
- International tax
- VAT
- Crypto taxation
- Transfer pricing and M&A advisory
- Mobile workforce compliance & advisory
- HR solutions & advisory

Valuation & Transfer Pricing

- Business valuations
- Transfer pricing
- Functional analysis
- Documentation
- BEPS