

FATCA COMPLIANT INVESTMENT SOLUTION



RESOLVE YOUR
INVESTMENT
REQUIREMENTS
LOCALLY WITH
YOUR ADVISOR,
ACCESS
INVESTMENT
FUNDS, MAKE
U.S. TAXES MORE
EFFECTIVE.

- ✔ Are you a holder of a U.S. passport or a Green Card?
- ✔ Are you filing U.S. tax returns?
- ✔ Have you ever been turned away by other financial advisors?
- ✔ Have you ever been advised to hold your savings in cash or move back to the U.S.?
- ✔ Have you had your U.S. brokerage account closed?
- ✔ Has your accountant told you that you have a PFIC?



Universal Access Bonds® are a remarkable solution for expats, including Americans & U.S. connected persons. At their simplest, UABs® allow easy and compliant access to the benefits of investing in a diversified portfolio managed by top tier investment managers.

The bond and platform provide the required tax reporting. UABs® are reported to the IRS in a similar fashion to a domestic U.S. mutual fund. Non-compliant investments (Passive Foreign Investment Companies) for overseas U.S. citizens are taxed as income (up to 37%). By completing a Qualified Electing Fund, UABs® can be eligible for Capital Gains Tax treatment instead (from 0%-20% subject to long/short-term considerations). There could be significant tax savings available for you.

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