

+ 2026 Edition

Cross-Border Strategy

Private wealth strategy for a world without borders.

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+ № 01 · How it works

The Approach

Two ways to work. One direct line to the answer.



Most planning is vague. You talk to someone, they nod, and nothing concrete lands in your hands. We work the other way. You leave with something real, and you always know exactly what you are getting.

There are two ways to work with us. A single strategy session, or an ongoing private client relationship. Both start with a conversation. What follows is up to you.

THE STRATEGY SESSION

$89

one-time

+ A direct call, free to cover whatever you need. Tax, structure, mobility, investment, succession, or all of it.
+ Afterwards, a personal call summary and review, written by Jay and sent to you. What we discussed, what it means, and the clear next steps.
+ One conversation, one deliverable. Need to go further? Book another.

THE PRIVATE CLIENT

On request

paid quarterly or annually

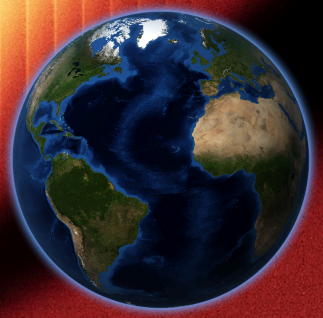
+ Perpetual, ongoing support across every area. Call, email, or message any time.
+ Constant plans, reviews, and models, built and maintained for you as the world moves and your life changes.
+ A standing partner who holds your whole position. Details on request.
+ Bespoke maintenance and management of global structures and positions.

Whichever you choose, it starts the same way. A conversation about where you are, and where you want to be.

+ № 02 · The single biggest lever

Cross-Border Tax

A drain, a leak, an anchor, a handcuff. Rarely just a bill.



Tax is the largest single force acting on serious wealth, and it is rarely just a bill. It is a drain on what you earn, a leak in how your money moves, an anchor on what you can build, and a handcuff on where you can go. The more you hold, the more a high-tax residence takes, year after year, for as long as you stay in it.

LEAVING, OR OPERATING ACROSS BORDERS

The problem takes two forms. Some want out of a high-tax country entirely, and find that leaving is not as simple as buying a flight. Others need to operate across jurisdictions, personally or through a business, and find their income taxed in places they did not expect, sometimes twice.

We structure your affairs across jurisdictions to legally minimise tax, avoid the mishaps that catch people out, and make sure you understand the rules and the possibilities before you act. Residence, dual-residence, clean exits, treaty positioning, and how income is earned and drawn, brought together into one deliberate plan.

HOW IT IS DONE

We map where you are taxed now and what it costs, model the position a restructure or relocation would put you in, and sequence the moves to get there cleanly. You leave knowing the route, the savings, and the order of operations. We build the strategy. Your own professionals handle the filing.

+ You are leaving a high-tax country but do not know which residence actually breaks tax, or what tail follows you out.

+ You run a business across three countries and suspect the same profit is being taxed twice.

+ You are paid personally when a company would keep far more, and no one has ever modelled the difference for you.

+ You want to move to a territorial-tax country but need to know the rules before you commit, not after.

+ № 03 · Entities that cross borders

Corporate Expansion

The right entity, in the right place, doing the right job.



A business that grows across borders needs more than a single company. It needs a structure. Where the holding company sits, where the operating companies trade, where profit lands, and how each entity connects to the next decides what the whole enterprise is worth and how much of its earnings it keeps.

BUILDING TO OPERATE IN MANY MARKETS

We build and position entities to operate, hold, and grow across multiple markets. Which jurisdictions to trade from, which to hold from, how to move value between them, and how to keep the structure clean as it scales.

The right architecture protects the business on one side and positions it for growth on the other. Holding companies, operating subsidiaries, and multi-jurisdictional groups designed to expand without collapsing under their own complexity.

HOW IT IS DONE

We design the corporate structure around where you want to operate and where you want profit to sit, then map the entities, the ownership, and the flows between them. You leave with a blueprint of the group and a route to build it. Formation and the local filing are handled alongside the right professionals in each jurisdiction.

+ You are opening in a new market and do not know whether to trade directly, set up locally, or hold through a third country.

+ Your group grew by accident, and profit is now trapped in the wrong entity in the wrong place.

+ You want a holding company over your operating businesses but do not know which jurisdiction fits.

+ You are acquiring a company abroad and need the structure right before the deal closes.

+ № 04 · Where the world is going

Global Investment

Where you put your money matters as much as how much you keep.



Most portfolios are built by accident, concentrated in one country, one currency, and one set of assumptions about the future. A bet that the place you already live keeps winning, placed without ever being examined.

The world is not that simple. The West is slowing under debt it cannot repay. The growth is elsewhere. Asia and Latin America are where the next decades happen, and most Western investors have almost no exposure to any of it.

POSITIONING AND DIVERSIFYING GLOBALLY

We position and diversify assets across jurisdictions and classes for three things at once: growth, access, and protection. Growth by weighting toward where the world is actually rising. Access by holding in the right places, in the right currencies. Protection by spreading wide enough that no single economy or government holds all of it.

This is strategy and structure, not product selection. We design the framework and the allocation, including the role of hard assets and sound money against the steady debasement of fiat. We do not recommend specific securities or funds.

HOW IT IS DONE

We assess where your wealth sits today, how concentrated and exposed it is, and design a globally diversified structure built around your risk and your timeline. You leave with the framework and the positioning. The specific instruments are yours to hold through your own providers.

+ You want land in Paraguay or a bodega in Mendoza but do not know the foreign-ownership rules or the real risks.

+ You want exposure to the Latin American upside without going all in on one country or one asset.

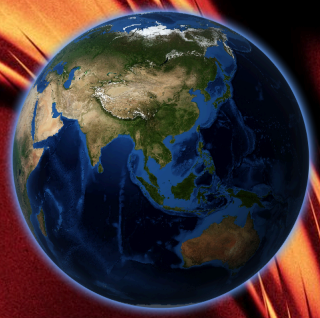
+ You are eyeing an apartment in Buenos Aires but have no read on the areas, the yield, the equity history, or the pitfalls.

+ You want to hold hard currencies and dial your USD exposure up or down to become more sovereign and borderless.

+ № 05 · Options, access, and a way out

Mobility & Living

Never dependent on one country continuing to behave well.



Most wealthy people are far more exposed than they realise. One country holds their residence, their assets, and their passport. If that country turns, raises its rates, closes its borders, or simply changes its mind, they have nowhere to go. Concentration in a single jurisdiction is not stability. It is a bet that nothing changes.

RESIDENCY, CITIZENSHIP, AND RELOCATION

We build a mobility and living strategy for you and your family. Residency where it serves your goals, a path to citizenship over time, and a genuine relocation plan rather than a document you chase. The result is sovereignty and a real plan B, secured before you ever need it.

Our home ground is Latin America, the region we know deepest and believe in most. We place clients there rather than selling residencies off a global shelf. Where a citizenship-by-investment program is the better route for you, whether the priority is cost or speed, we advise on its strategy and position you correctly. We do not sell programs.

HOW IT IS DONE

We rank the residencies and citizenships that fit your goals by cost, timeline, and consequence, then design the route to the one you choose and how it sits within your wider structure. You leave with the plan and the path. The application and the managed steps follow from there.

+ You want a second residency in Latin America but do not know which country fits your goals, your taxes, or your family.

+ You need a genuine plan B and somewhere to go if your home country turns, not just a document in a drawer.

+ You want a path to a second citizenship over time and need to know the real timeline and the steps.

+ You are weighing a citizenship-by-investment program and want to know if there is a better route on cost or speed.

+ № 06 · Wealth that outlives you

Succession & Estate

Everything you build eventually passes to someone else.



Whether it passes cleanly or is torn apart by tax, courts, and family conflict depends entirely on what you put in place now. Most wealthy people put in nothing. Then the state takes its share, the process drags through probate, forced-heirship rules override their wishes, and the family fractures over what is left.

Across borders it is worse. Assets in several countries mean several sets of inheritance rules, often in direct conflict, each with its own claim on what you leave behind.

HOLDING AND PASSING WEALTH ACROSS GENERATIONS

We structure how your wealth is held and how it passes on, cleanly, across borders and across generations. Trusts, foundations, and holding structures that carry wealth to the people you choose, without probate, without forced-heirship interference, and with inheritance tax minimised.

The cross-border complications are resolved into one coherent plan rather than a collision of competing regimes. And the next generation is prepared and governed, so the wealth survives the handover rather than being squandered by it.

HOW IT IS DONE

We show you where your estate would actually go today if nothing changed, and the gap between that and what you intend. Then we design the structure that closes it: who receives what, through which vehicle, with tax and probate engineered out. You leave with the plan and the structures to execute it.

+ You have assets in several countries and no idea whose inheritance rules win when they collide.

+ You want your wealth to reach your children without the state taking forty percent or the process dragging through probate.

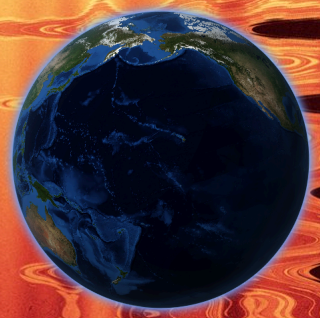
+ You are in a country with forced-heirship rules that would override your wishes, and you want them structured around.

+ You want the next generation prepared and governed, so what you built survives them rather than being squandered.

+ № 07 · The foundation everything sits on

Wealth Architecture

The problem is not disorder. It is the wrong order.



Serious wealth is almost always structured. That is exactly the problem. It is structured in one place, in one currency, in the assets of the past, sitting inside a single domestic system that is slowly degrading in real terms. It looks like it is growing. The number on the statement climbs. But the yardstick is shrinking faster, and much of that growth is an illusion produced by a debasing denominator rather than any genuine gain.

A FRAMEWORK BUILT FOR A SHIFTING WORLD

We design a resilient framework that de-risks against collapse while positioning you to capture the upside of a shifting world order. Genuine diversification across countries, currencies, and asset classes. Genuine growth on a global playing field. Genuine protection, spread so that no single domestic failure can reach all of it.

This is the master structure, the one every other area hangs from. Your tax, your entities, your investments, your mobility, and your succession are not separate problems. They are dimensions of one architecture, and they work only when they are designed together.

HOW IT IS DONE

We take a real-terms x-ray of where your wealth sits, how concentrated it is by country and currency, and where a single shock could reach it. Then we design the redesigned architecture: diversified, measured in purchasing power, and de-risked from any one system. Structured for a world that is fading, rebuilt for the one arriving.

+ Your wealth is all in one country and one currency, and you can feel it losing ground in real terms.

+ Your statement keeps climbing but you suspect most of the growth is the currency being debased, not real gain.

+ You want genuine diversification across countries, currencies, and assets but do not know where to start.

+ You want a structure that survives a domestic collapse and still captures the upside of a shifting world.

+ № 08 · Keeping what you have built

Asset Protection

Building wealth is one problem. Keeping it is another.



The more you have, the more people want a piece of it. A lawsuit, a creditor, a divorce, a hostile government. Any one of them can undo decades of work if nothing stands between you and them. Wealth that is not protected is wealth that is merely waiting to be taken.

RINGFENCING THROUGH JURISDICTION AND STRUCTURE

We ringfence your wealth from litigation, creditors, and political risk through jurisdiction and structure. The right assets moved into the right protective vehicles, in the right order, so that what is yours is placed legally beyond reach.

The strongest protection on earth sits in a handful of jurisdictions built specifically for it. Their law ignores foreign judgments and forces any claimant onto ground designed to defeat them. Paired correctly, a trust as owner with a protected entity holding the assets, you keep day-to-day control while creditors meet a wall they cannot climb. Relationship and divorce shielding is built into the same structure.

HOW IT IS DONE

We map where you are vulnerable, to whom, and what it would take to close each gap, often the first time the real risks are named. Then we design the defence and the structures that execute it. You leave with the plan and the means to put it in place.

+ You are exposed to litigation in your profession and want your wealth placed beyond the reach of a future claim.

+ You are going through, or fear, a divorce, and want family wealth ring-fenced before it is ever at stake.

+ You hold assets in a country whose politics are turning, and you want them moved somewhere a court there cannot reach.

+ You want the strongest protective structure available but need to keep day-to-day control of your own assets.