



Have you missed opportunities for international clients?

[www.interretire.com](http://www.interretire.com)

**interRetire**  
The International Retirement Solution

# How many expatriates are there?

- 1 million Australians live outside Australia
  - two thirds have relocated for work in professions and management
- 80,000 skilled workers leaving Australia each year #
- 120,000 expatriates return yearly for major life events
  - education and retirement #
- Increasing number of business migrants to Australia
  - Bringing their families

*# Australian Bureau of Statistics*

# Which expatriates need advisory services?

High income and High Net worth clients such as:

1. Senior temporary Australian resident executives
2. Higher earning expatriate executives
3. Business migrants including Significant Investor Visas
4. Companies with international operations

# Current Situation

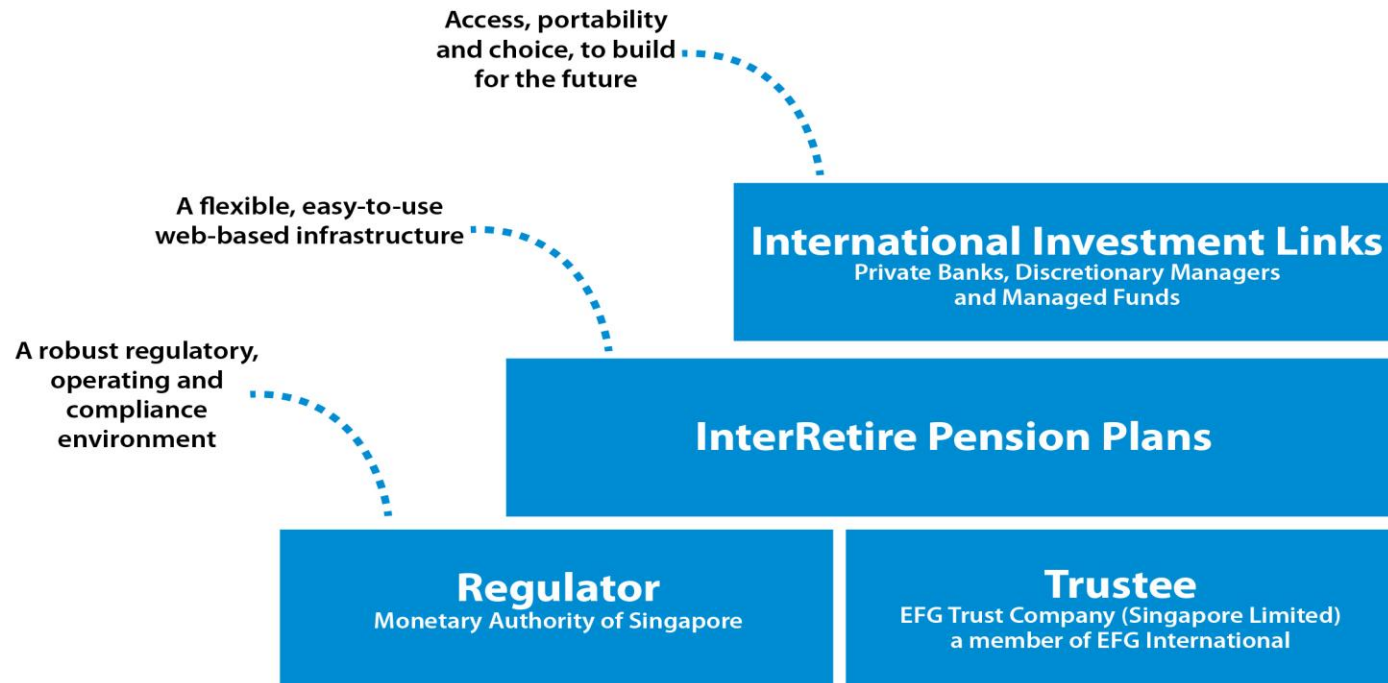
- **Advisor perspective**
  - Australian based professionals losing highly valued clients when they go overseas
- **Client perspective**
  - Shortage of Australian advisors offering tax and estate planning advice to international clients
  - Australian based legal structures (including super) not suitable for senior mobile skilled professionals and business migrants

# Benefits for Advisors

- Professional Advisors can earn premium fees for specialised strategic advice to high net worth clients.
- Investment Advisors can increase “ **funds under management**” for highly valued clients currently being ignored.
- Referrals to other high income/net worth international clients.

**#### Foreign Superannuation may form a key part of advice to international clients**

# What Is InterRetire?



# Case Study 1

## Australian Temporary Resident

### **\$A 10 million bonus paid into foreign super plan**

- Employee Tax Saving
  - Tax saving of 15% or \$1.5 million ( 15% on \$ 10 million) #
- Employer( Payroll Tax Saving)
  - Tax saving of \$150,000 #

# Employee not assessable to tax (45%) on foreign super contribution  
Employer unable to claim tax deduction(30%)  
Net saving to employee 15%

# Case Study 2

## Australian Temporary Resident

### **\$A 10 million bonus paid into foreign super plan**

- Hong Kong based senior expatriate returning to Australia, appointed Chairman global Australian business
- US\$ 10 million of savings requiring professional advice and investment management

### **Advisor and Asset Management Services included**

- Retention of assets offshore via “ Foreign Super” advice
- Australian SMSF advice
- Investment management services (offshore and onshore retirement structure assets)
- Supporting Australian and international tax advice



# Benefits for Advisors

- Strategic & Tax Planning Fees – initial and ongoing
- Funds under management
- Advisor relationship with key decision makers
  - *Referrals to other company executives*
  - *Sponsor of corporate retirement plans*
  - *Introductions to similar premium international clients*

# Next Step

## Contact Us

### Advice

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### Structure

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*Have a conversation to determine if this strategy will  
add value to your international clients*