



alexander beard

Cross border financial planning for globally mobile individuals and families

There are many advantages to a globally mobile career, not all of them financially focussed. However, looking after the rewards that emerge and protecting health and welfare are key considerations to a long and successful 'expat' lifestyle.

Have you thought about:

Maximising your longer-term saving and investing opportunities to build wealth?

Who can support you in overseeing assets accumulated in different countries?

The peace of mind of insurance that is as mobile as you are, to help you navigate difficult times that can de-rail your financial planning?

How to get the best from your globally accumulated assets when you decide where to settle?

We can support you with:

Regular tax-friendly savings¹

Investing capital in individually tailored portfolios²

Ongoing management of pension funds from previous employment

Continuity of advice and service from our locally regulated and authorised offices.³

International globally mobile life and health insurance

Easing the transition to either your home country or the country in which you choose to settle

With authorised and regulated offices in the UK, Eire, USA, Australia, France, Germany, the Netherlands and South Africa, Alexander Beard companies are ideally placed to support your global career.

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1. We don't recommend offshore, insurance based, long contractual savings plans that are commission driven and have early encashment penalties.
2. We can offer products with 24/7 online access, ideal for those in different time zones.
3. A number of European countries' tax authorities require 'country-friendly' constructs.

