AI Wealth

INVESTMENT MANAGEMENT

JUNE 2024

ISSUE NO 1

WELCOME TO FRANCE

YOUR GUIDE TO FINANCIAL SUCCESS IN FRANCE

FRANCE

CONTENTS

PAGE 3

WELCOME TO FRANCE

PAGE 4

TAX PLANNING & BANKING

PAGE 5

INVESTMENTS & RETIREMENT

PAGE 6

ESTATE PLANNING & INHERITANCE

PAGE 7

CURRENCY EXCHANGE & COMPLIANCE

PAGE 8

MEET YOUR FINANCIAL ADVISOR

PAGE 9

CONTACT AI WEALTH TODAY

WELCOME TO FRANCE

Welcome to France!

As you embark on your journey to France, one of Europe's most captivating destinations, we at AI Wealth extend our warmest greetings. With its strategic location, stable economy and high standard of living, France offers numerous opportunities for international expats like yourself. As seasoned financial advisors specialising in serving expatriates, we are here to guide you through the intricacies of managing your finances in your new home.

Navigating the Financial Landscape

France's appeal extends far beyond its natural beauty and rich cultural heritage. As you settle into your new life here, it's crucial to establish a solid financial foundation. From tax planning to investment strategies and mortgage advice, our comprehensive guidance covers everything you need to know to thrive financially in France.

TAX PLANNING & BANKING

Optimising Your Tax Strategy

Understanding the tax implications of your residency status is vital for maximising your financial benefits in France. Our expert advisors will help you navigate the various residency options and craft a tax strategy tailored to your unique circumstances. Whether you're a non-resident, resident or applying for residency, we'll ensure you minimise your tax liabilities while remaining compliant with French tax laws.

CLICK HERE TO BOOK A MEETING

Expat Banking Solutions

Opening a bank account is a fundamental step in managing your finances effectively in France. Our team will guide you through the process, assisting you in selecting the right banking institution and account type to suit your needs.

INVESTMENTS & RETIREMENT

Building Your Wealth

AI Wealth can provide international expats in France with expert advice on a wide range of investment opportunities. Whether your interests lie in ESG investing, real estate, stocks, bonds or other financial instruments, our advisors will provide you with the insights required to build and safeguard your wealth.

Through risk assessment and market analysis, we can help you create a portfolio that is both tax efficient and portable.

Trust AI Wealth to be your partner in wealth accumulation and allow your investments to flourish in alignment with your long-term objectives.

Planning for Your Golden Years

Retirement planning is an essential cornerstone of lasting financial security and our experienced advisors are well-versed in the nuances of strategic retirement preparation.

AI Wealth can help you mitigate potential shortfalls in the French pension system by exploring private pension schemes and developing a comprehensive retirement plan tailored to your aspirations.

With AI Wealth by your side, you can enjoy a worry-free retirement in this beautiful country; assured that your retirement dreams are backed by diligent planning and expert advice.

CLICK HERE TO BOOK A MEETING

ESTATE PLANNING & INHERITANCE

Preserving Your Legacy

Estate planning is a pivotal aspect of financial management, particularly for expatriates with assets and interests spanning more than one jurisdiction.

The expert advisors at AI Wealth are dedicated to providing you with comprehensive guidance, tailored to your unique circumstances. From manoeuvring through the complexities of French inheritance laws to crafting meticulously detailed wills and trusts, we ensure that your legacy is preserved and distributed according to your wishes.

With our attentive approach to estate planning, you can rest assured that your loved ones will be well taken care of and your assets will be managed with precision and care across generations.

Entrust us to safeguard your wealth and honour your legacy through our specialised estate planning services.

CLICK HERE TO BOOK A MEETING

CURRENCY EXCHANGE & COMPLIANCE

Safeguarding Your Transactions

Currency exchange and international money transfers constitute unavoidable elements of expatriate life in France. Our team of seasoned professionals is dedicated to assisting you in navigating the intricacies of foreign exchange markets, thereby reducing transaction expenses and optimising the efficacy of your transfers.

Whether you're repatriating funds, diversifying investments abroad, or sending money to family and friends overseas, rest assured that we prioritise the meticulous execution of your transactions, ensuring utmost diligence and transparency throughout the process.

Staying Compliant & Informed

Navigating the legal and regulatory landscape of a new country can be complex for expats. This is why we're committed to ensuring your financial compliance throughout your time in France.

Whether you're an expat entrepreneur establishing a business, or a retiree navigating personal tax considerations, we'll assist you in understanding and meeting your financial responsibilities. With our expertise and attention to detail, you can confidently focus on enjoying life in France.

CLICK HERE TO BOOK A MEETING

MEET SIMON VOYSEY - YOUR IFA IN FRANCE

“Whether you're just starting to save or already have substantial assets, quality financial advice is essential for expats in France.”

Simon Voysey is a Senior Partner at AI Wealth and has almost 30 years of experience in providing financial services to international expats. His extensive expertise includes financial advice, personal tax planning, investments, insurance, retirement planning and wealth management.

With a rich background in financial consulting, Simon has served as a Partner at Global Wealth Management Solutions LLP and held the position of Director at Integra FM. Simon's career trajectory underscores his commitment to guiding individuals and businesses toward financial security and success by leveraging his diverse skill set and industry experience. This allows him to provide tailored solutions that align with clients' goals and aspirations.

Unlock Your Financial Potential with AI Wealth

At AI Wealth, we are dedicated to helping expats like you achieve financial success in France and beyond. With our comprehensive range of services, personalised guidance and unwavering commitment to your financial well-being, we'll help you navigate the complexities of expat life with confidence and peace of mind. Contact us today to schedule a consultation and take the first step towards a prosperous future in France .

CLICK HERE TO BOOK A MEETING

CONTACT AI WEALTH TODAY

Where to Find Us

Asset Ibérica Underwriting S. L.
Carrer d'Aribau, 195 Sarrià-Sant Gervasi
08021 4t, Barcelona
Spain

If you would like to visit our head office in Barcelona, Spain, please click the following link to find us on Google Maps.
This address is for business purposes only/ Esta dirección es solo para fines comerciales.

CLICK HERE FOR GOOGLE MAPS

AI Wealth Contacts & Links

www.aiwealth.eu
enquiries@aiwealth.eu
+34 93 737 70 78
https://www.facebook.com/aiwealth.eu
https://www.linkedin.com/company/ai-wealth-investment-management

Legal

None of the information, whether in part or full, should be copied, reproduced or redistributed in any form nor should it be regarded as an offer or a solicitation of an offer for investment. You should satisfy yourself, with your financial advisor, that the products and services offered are suitable for you and that you are not prevented from accessing such services or products by restrictions placed on you by the relevant fiscal authorities in your normal place of residence nor that it is unlawful for you to participate in such products or services as may be stipulated within the laws of the country, state or jurisdiction where you may either be a citizen or normally reside. Investments can go down as well as up, and you may not get back the full amount invested. Past performance is no guarantee of future performance. Currency fluctuations will affect the value of overseas investments. Emerging Markets can be more risky than developed markets. Current tax levels and reliefs may vary and will depend on your personal circumstances.