AI Wealth

INVESTMENT MANAGEMENT

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WELCOME TO GREECE

YOUR GUIDE TO FINANCIAL SUCCESS IN GREECE

GREECE

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WELCOME TO GREECE

Welcome to Greece!

As you embark on your journey to Greece, nestled in the eastern Mediterranean and celebrated for its rich history and vibrant culture, we at AI Wealth extend our warmest greetings. With its strategic location, stable economy and high standard of living, Greece 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

Greece'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 Greece.

TAX PLANNING & BANKING

Optimising Your Tax Strategy

Understanding the tax implications of your residency status is vital for maximising your financial benefits in Greece. 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 Greek 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 Greece. 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 Greece 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 build 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 Greek 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 Greek 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 Greece. 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 Greece.

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 Greece.

CLICK HERE TO BOOK A MEETING

MEET JOE ALBAYATI - YOUR IFA IN GREECE

“My approach delivers world-class tax and financial planning services to individual and corporate clients in Greece, tailored to their objectives.”

With 12 years of experience in providing financial advice to international expatriates, Joe Albayati (BAFin, MScM, CIFS) has extensive expertise in expat financial services, portfolio management, personal tax planning, investments, retirement planning and wealth management.

Joe is an accomplished financial consultant who holds the position of Associate Partner at AI Wealth in Greece. Joe's primary focus is the expatriate and internationally mobile community in Greece, whose financial planning and investment needs tend to be more complex due to their nationality and/or the likelihood of them living and working in different countries.

Unlock Your Financial Potential with AI Wealth

At AI Wealth, we are dedicated to helping expats like you achieve financial success in Greece 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 Greece.

CLICK HERE TO BOOK A MEETING

CONTACT AI WEALTH TODAY

Where to Find Us

Asset Ibérica Underwriting S. L.
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08021 4t, Barcelona
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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

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