YOUR WEALTH. YOUR FUTURE.
WHEREVER IN THE WORLD YOU RESIDE

WWW.BEACONAMERICANADVISORS.COM
WHAT WE DO

Beacon American Advisors core belief is “to be of service, nothing is more noble”. We lead a group of cross-border financial planning and investment specialists around the world who deliver straightforward advice on the complexities of cross-border wealth management. We have a network of other professional advisors including tax, estate planning, insurance, and mortgages whose expertise can be brought to bear to support you in achieving your goals.

HOW CAN WE HELP

Managing the complexities of cross-border financial planning is difficult. We help “U.S. connected persons” with high quality, specialist, financial planning and investment advice. We partner with you in “joined up thinking”. We’ll help you look at your overall financial picture wherever your assets are in the world through one seamless service.

You may be clear that you’re a U.S. connected person; we’ve learned many people are not clear.

You’re a U.S. connected person if you are:

- A United States Citizen
- Born in the United States
- Born Outside the U.S. of a U.S. Parent
- Naturalized Citizen
- Green Card Holder
- Tax Resident in the U.S.
- Filing a U.S. Tax Return
RELATIONSHIP MANAGEMENT

You will have a dedicated advisor that works with you and coordinates the services of a U.S. advisor. If you would like, we can also work with you to identify other professional advisors such as tax, estate planning, insurance, mortgages; whatever services are required to ensure all your financial planning needs are met both in the U.K. and in the U.S.
OUR SERVICES

U.K. INVESTMENTS
As a U.S. connected person living and working in the U.K., you need to take care of how you structure your financial planning as you have a continued U.S. tax filing requirement. As the U.K. is a signatory of FATCA, any investments held outside of the U.S. must be tax compliant or there could be significant tax penalties. We assist U.S. connected persons to structure their investment planning so that any investments held outside the U.S. in either GBP or US$ can be held in a compliant and tax efficient manner; this includes appropriate offshore planning.

U.K. PENSIONS
Many U.S. connected persons are accruing or have accrued pension funds in the U.K. Due to their U.S. citizenship, many U.K. pension providers will not want to deal with them at retirement. This makes accessing benefits very challenging. We assist them with “at-retirement” pension planning by providing fully flexible and Defined Benefit/Final Salary pension advice in the UK or after they return to the U.S. We also deliver currency solutions within UK pension plans where the underlying funds can be held and invested in US$, GBP or Euro with transfers between any of these currencies at a time of their choosing to mitigate currency risks.
U.S. RETIREMENT PLANNING
In addition to any overseas pension it’s likely you will have U.S. assets allocated for retirement, we can assist you with:
- Retirement Planning
- Employee Benefits Plan Analysis
- 401(k) / Qualified Plan Allocation
- IRAs - Traditional, Roth, SIMPLE and SEP IRAs.

U.S. INVESTMENTS
Considering your U.S. assets and plans is an important element in your overall financial planning. We take your entire financial picture into account, or we can tailor the plan to a specific goal or issue.
- Comprehensive Financial Planning, Estate Planning, College Planning, Tax Planning and Management
- Asset Management/Distribution Planning for Separation & Divorce
- Long Term Medical Care Planning
- Stock Options Analysis
- Brokerage and Investment Advisory Services
- Domestic Partnership and Couples Planning
- Planning for Special Needs Individuals
- Budgeting and Cash Analysis
- Insurance and Risk Analysis
At Beacon American Advisors we understand being American. Our founders and many of our leadership team are American. We have walked in our client’s footsteps, shared their excitement and their frustration. Our goal is simple “to be of service, nothing is more noble”.

We trace our origins back more than 20 years to 1996 when one of our founders formed Beacon Financial, based in New Jersey with a focus on supporting clients with financial advice as well as providing extensive financial education to corporations. In 2004 we launched a business focused on law enforcement, again supporting clients directly and providing financial education. In 2015 we realized the needs of Americans overseas were not being met and so two of the founders moved to Europe to once again work with clients and spread financial education.

We assess your needs and then assign one of our select cross-border experts who can advise you on your finances wherever you’re based in the world. We select, train and audit these advisors to make sure they maintain their deep domain expertise, undergo continuous education and most importantly with their colleagues to meet your needs.
VALUES

- The client is everything, we put the needs of our clients ahead of our own, always
- We are transparent and objective
- We seek opportunities to be innovative with our partners and clients
- We operate with integrity in everything we do – trust, professionalism and privacy
- We take personal accountability for everything we commit to and execute with excellence
- We treat each other with trust and respect, always assuming positive intent
- We meet challenges with a focus on openness, directness and resolution
- We work as a team, building a collaborative enterprise for all
- We believe in family and the balance that brings to our lives. We have fun!
- We and our advisors are fairly compensated for the services they provide
We are delighted to have a no obligation conversation with you to see if you could benefit from BAA.

PLEASE CONTACT US

- Service@BeaconAmericanAdvisors.com
- 020 3397 2755
- www.BeaconAmericanAdvisors.com

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