

“ When it comes to managing your finances and assets across borders, it’s not a case of ‘out of sight out of mind’. There is a lot you can be doing whilst overseas to ensure your return home is smooth and profitable. ”

EXPATSERVICES

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COMMONLY ASKED QUESTIONS

- > When do I need to start thinking about my repatriation checklist?
- > What opportunities do I have to use Superannuation now and when I return home?
- > When do I need to review my Will to take into account my circumstances overseas before returning to Australia?
- > What is the implication of overseas assets and how should I return them?
- > When do I become a tax resident in Australia?
- > What is the outlook for interest rates, property and the global economy that could affect my return?

| Area of Concern | Action to Consider | 0-2 years | 2-5 years | >5 years |
|--|---|-----------|-----------|----------|
| Benefits of planning ahead | Start Planning | > | > | > |
| Superannuation in Australia | On-going portfolio advice | > | > | > |
| | Maximising contribution strategies | > | > | > |
| | Importance of nomination beneficiaries | > | > | > |
| Personal Succession and Estate Planning | Estate planning strategy | > | > | > |
| | Wills - Australia based | > | > | > |
| | Wills - Overseas based | > | > | > |
| | Australia based power of attorney option | > | > | > |
| Repatriation and the Transfer of Money | Exchange rate advantages | > | > | > |
| | Asset Sales | > | > | > |
| Tax Effective Structuring in Australia & SMSFs | Family Trusts | > | > | > |
| | SMSF | > | > | > |
| | Corporate Entities | > | > | > |
| Retirement planning for repatriation | Super, Estate Plan, Asset Sales, Repatriation of Funds to Australia | > | > | > |

KEY:

| | | |
|-----------------|--------------------|------------------|
| No time to lose | Start making plans | No action needed |
| > | > | > |



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