NEWS

For Immediate Release

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Press Invitation to International Live Webinar that Demystifies U.S. ExPat Investments and Financial Planning

New York, NY [August 31, 2022] U.S. Expat investing and financial planning is of great importance to all American citizens who spend time abroad, relocating for work, or in their retirement years.

Member of the press are invited to join us for the webinar detailed below. If you can't join at the appointed time, that's fine – we can send you a replay of the event to review at your leisure. The webinar will focus on U.S. Expat financial planning and investing, and will be broadcast live in New York City, Lisbon, Frankfurt, Tokyo and Sydney simultaneously.

Most U.S. Expats need specialized help when living abroad, but very few financial advisors actually know how to navigate this complicated road. However, Frederic Behrens, Senior Director and Wealth Advisor at Round Table Wealth Management, has devoted his career to learning and managing all the intricacies of U.S. Expat investing.

When: Thursday, September 8 at 9am Eastern Time

To register: click here

DISCUSSION TOPICS INCLUDE:
- Building a strategic and tax efficient investment portfolio
- Use of U.S. and non-U.S. retirement accounts
- Currency management
- International estate planning
- College savings

- Planning for families that include a non-U.S. spouse
- Recent U.S. tax law changes

We think these issues could be a great series for your outlet.

ABOUT FREDERIC BURNS

Frederic Behrens, CFP®, J.D., has significant experience working with U.S. citizens living abroad, non-resident aliens, and mixed-nationality families. Well-informed on tax and compliance issues, Frederic authored a widely-cited article on FATCA for the Wisconsin Law Review. He brings significant cross-border tax and international estate planning expertise to his client relationships. Behrens is responsible for managing clients and coordinating all aspects of the investment management and financial advisory services for his relationships. He is experienced in working with high-net-worth individuals and international families.

ABOUT ROUND TABLE WEALTH MANAGEMENT

Round Table Wealth Management (RTWM), an independent financial advisory firm established in 1999, is managed by four partners with over 100 years of industry experience. They, along with other members of the firm, form a dedicated team of highly-credentialed wealth advisors, financial planners, and investment management professionals.

Global in their investing and personalized in their service, the firm provides objective strategies designed to meet the far-reaching goals of each client in a personal and comprehensive manner. Those clients are comprised of high-net-worth individuals, families (national and global), business owners, professionals, and women investors seeking thoughtful financial advice and guidance to grow and preserve their wealth.

With approximately $1.6B AUM, RTWM offers personalized advisory services supported by institutional knowledge, deep experience, and skilled expertise. Their fiduciary approach involves a suite of holistic planning services including investment, philanthropy, retirement, insurance, cash flow and tax and estate counsel. Learn more at www.RoundTableWealth.com.

If you would have any further questions or would like to interview Behrens on any and all things related to U.S. Expat investments and financial planning, please contact Grace Vogelzang at phone number (913) 649-5009 or via email at GraceVogelzang@ImpactCommunications.org.

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