

# NEWS

For immediate release



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## Investment Strategies for Americans Abroad: Levitt Capital Management Announces Upcoming Events

*Firm to participate in two seminars to inform Americans on investing internationally and specifically in France*

**NICE, FRANCE (February 11, 2025)** – [Levitt Capital Management](#) (LCM) is pleased to announce two upcoming events aimed at providing valuable insights into investment strategies for Americans residing in Europe. Both of these events are designed to address the unique financial challenges faced by U.S. citizens/dual citizens living overseas, and both will feature [Robert Levitt](#), founder of Levitt Capital Management. His expertise will provide those who attend with practical strategies to better manage their investments while also navigating the complexities of international financial regulations.

“Most Americans have no idea what they are supposed to do with their finances when they move overseas,” said Levitt. “For instance, failure to report foreign bank accounts and correspondingly submitting FATCA Form 8938 can result in severe penalties. Residency calculation is complex – and miscalculation can come back to bite you. In addition, France imposes a wealth tax on real estate holdings which may surprise some residents, and Americans who fail to sever ties with their last U.S. state of residence may still owe state taxes despite living abroad. After living in Nice, France, for a while, I started to realize that Americans living in Europe face a lot of challenges because of laws in the U.S. that were created to catch people who might be hiding money. We’re here to help them avoid these pitfalls and many more.”

### **EDUCATIONAL OPPORTUNITIES FOR AMERICANS ABROAD AND DUAL CITIZENS IN 2025**

#### **1. [Investment Strategies for Americans in France](#)**

- **Date:** Wednesday, February 12, 2025
- **Time:** 6:30-7:30 PM CET
- **Location:** Omid & Gisel Kordestani Rooftop Conference Center - 6 Rue du Colonel Combes, 75007 Paris, France

This seminar will be hosted by [The American University of Paris](#) (AUP) and led by Robert Levitt. This event focuses on investment options available to U.S. citizens living in France, and will cover topics such as:

- French savings programs available to US citizens
- Action to take on U.S. investments
- U.S. investment products you can have while resident in France
- Avoiding tax penalties on the U.S. or French side

**General Admission:** The event is open to all members of the AUP community. While the online registration process is now closed, interested parties – including members of the press – may contact Yana Kossinskaya at [ykossinskaya@levittcapital.fr](mailto:ykossinskaya@levittcapital.fr) to inquire about available spots at the conference.

## 2. [How To Invest For Americans Abroad & Dual Citizens 2025](#)

- **Date:** Wednesday, February 19, 2025
- **Time:** 2:00 PM – 3:30 PM EST (8:00 PM – 9:30 PM CET)
- **Format:** Online Webinar

In partnership with [Democrats Abroad](#), this webinar will feature Robert Levitt discussing the complexities of investing as an American abroad. Key discussion points include:

- What you can and cannot do with investments in Europe
- Challenges in opening brokerage accounts
- What are the concerns with investment in European packaged products (PFIC)
- Understanding double taxation and how to avoid it

**General Admission:** Tickets are priced at \$15 for general admission and \$7.50 for retirees, students, or unemployed individuals. To register and for more information, please visit: <https://www.democratsabroad.org/investingabroad2025>

**Press Passes:** Journalists are welcome to attend the webinar. Email Yana Kossinskaya at [ykossinskaya@levittcapital.fr](mailto:ykossinskaya@levittcapital.fr) for a press pass.

## LEVITT ATTENDING THE T3 TECHNOLOGY TOOLS FOR TODAY CONFERENCE

Levitt will be attending the upcoming [T3 Technology Tools for Today Conference March 3<sup>rd</sup> – 6<sup>th</sup> in Dallas, TX](#). He is available for interviews and welcomes the opportunity to speak with members of the press about how LCM uses technology and AI to better serve clients and run a more efficient

financial advisory firm. Please contact [DoriThomas@ImpactCommunications.org](mailto:DoriThomas@ImpactCommunications.org) to schedule an in-person meeting with Robert Levitt.

## **ABOUT LEVITT CAPITAL MANAGEMENT**

Founded by Robert Levitt and based in Nice, France, Levitt Capital Management is a wealth management firm specializing in providing tailored financial solutions for Americans residing in Europe, especially those living in France. With a focus on personalized service and in-depth knowledge of international financial landscapes, Levitt Capital Management assists clients in achieving their financial goals while ensuring compliance with both U.S. and local regulations. Mr. Levitt has been profiled in Forbes, RIABiz, InvestmentNews, Financial Planning, International Adviser, Leaderonomics, Democrats Abroad, The American in Paris, and more. For more information about Levitt Capital Management and their services, please visit <https://levittcapital.fr/>

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