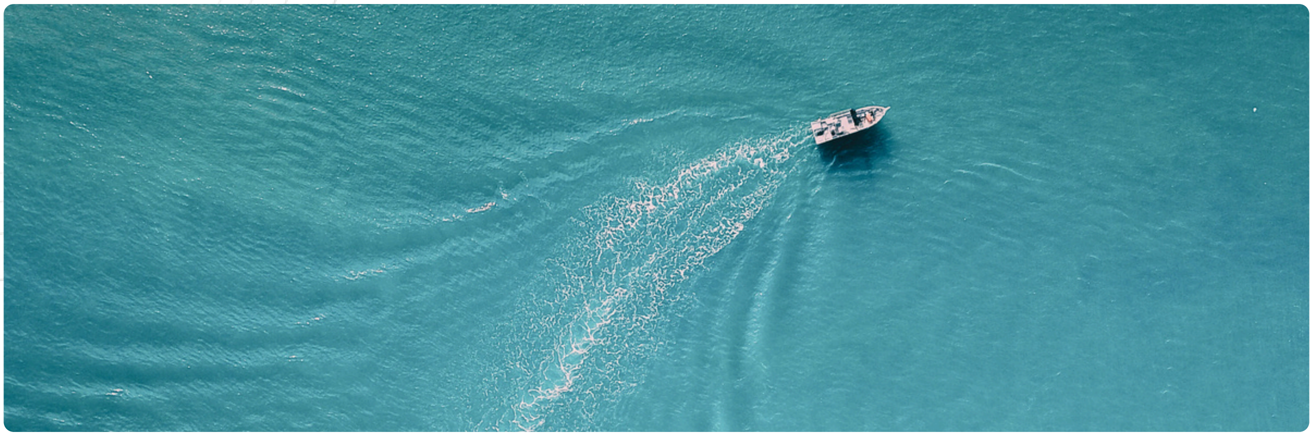
Wealth Management Without Borders

CROSS BORDER | WEALTH

www.crossborder-wealth.com

Table of Contents

Back to top



As you embark on your cross-border journey in pursuit of your financial aspirations, you may have come across difficulties in managing your wealth from overseas. Understandably so, as navigating the complexities of investments, taxes, currencies, and diverse financial landscapes across multiple countries can indeed be a daunting task.

This is why we founded Cross Border Wealth. We wanted to create a new breed of global investment advisory firm that is focused on our approach. We set our sights on US-connected individuals and provide them with specialized overseas wealth management solutions that are tailor-fit to address their unique cross-border challenges and needs.

Today, we have global presence in key US cities, the Middle East and Asia. We look forward to having the privilege to know more about your cross-border financial journey, and share ways we can help you achieve the goals you set for you and your family.

Antoni Yturralde,
Co-Founder and Managing Partner

When we are financially secure, we have the freedom to pursue our dreams and to live the life we want to live. This is why many of us go places far and wide, relocating across continents, to achieve financial security.

However, if you are living or working overseas, managing your wealth and finances becomes highly complicated. You have to deal with complex tax laws, different currencies, and regulations in multiple countries. That's where Cross Border Wealth comes in. Seeing that there's a dearth of financial institutions that focus on the unique challenges of managing wealth overseas, we've made it our mission to address this specific largely unaddressed need.

Over the years, our team of dedicated, passionate cross-border wealth management specialists have helped US-connected global individuals manage their pension, investment, taxation and wealth across multiple jurisdictions. We look forward to helping you navigate the complexities of overseas wealth management, and be a part in your journey towards achieving your financial goals.

Fabrice Mercier,
Co-Founder and Managing Partner

Back to top

OUR PHILOSOPHY

Wealth Management Without Borders™

This is our core ethos, our guiding principle.

We believe that distance should not hinder US-connected global individuals when it comes to managing their wealth. Driven by this belief, we focus on providing specialized overseas wealth management solutions that are tailor-fit to their unique needs.

Back to top

WHO WE ARE

We are Cross Border Wealth

Overseas Wealth Management Specialists

Cross Border Wealth is a US-based investment advisory firm focused on providing specialized overseas wealth management solutions to US-connected global individuals and their families.

This can include international pension management, tax planning, investment management, retirement planning, estate planning, all of which take into account the unique complexities that come with managing assets and financial interests across different countries.

Headquartered in New York, with global presence spanning the United States to Asia, our cross-border wealth management team is positioned to serve clients wherever they may be.

Back to top

WHO WE ARE FOR

We focus on helping US-connected global individuals and their families.

Americans Living Overseas

Whether you're a US citizen or US Green Card holder living outside the United States, we can help.

Foreign Nationals with US Investments

If you worked in the US, we can help you manage your 401(k), 403(b) and IRA plan now that you're residing abroad.

US Residents with UK Pension

If you're having difficulty accessing or managing your UK pension from the US, we're here for you.

Our Mission

Enable US-connected global citizens to pursue the financial goals they set for themselves and their families, unhindered by distance.

Our Vision

Be the most trusted partner of US-connected global citizens, renowned as the foremost specialists in overseas wealth management.

Back to top

Our Specialized Solutions

International Pension Solutions

We optimize US retirement plans such as 401(k), 403(b) and IRA for US-connected global citizens. Likewise, our cross-border specialists help US residents manage their UK private pension plans and QROPS.

Global Wealth Management

We offer comprehensive cross-border financial planning that addresses the challenges faced by US-connected global citizens when dealing with multi-jurisdiction tax, compliance and currencies.

Back to top

OUR PROCESS

US Pensions Solutions

Assess

- Identify client needs, opportunities and objectives
- Inform client about options in managing their 401(k) from overseas
- Check if client's global assets need special consideration
- Define any vulnerabilities in existing arrangements

Research

- Help clients locate inaccessible or lost 401(k) plans
- Collect relevant information on existing 401(k) plans
- Analyze findings and prepare consolidation proposal
- Present the available options and value-add by the firm

Implement

- Provide client with a formal recommendation
- Leverage partnerships for specialized solutions
- Update clients regularly on transfer progress
- Provide strategic portfolio guidance

Optimize

- Conduct quarterly reviews with client
- Review optimal asset allocation
- Optimize distribution strategies
- Provide specialized client support

SCHEDULE A CALL

Back to top

OUR PROCESS

UK Pensions Solutions

Assess

- Identify client needs, opportunities and objectives
- Inform client about UK pension entitlement options
- Check if client's global assets need special consideration
- Define any vulnerabilities in existing arrangements

Research

- Help clients locate inaccessible or lost UK pensions
- Collect relevant information on existing UK pensions
- Analyze findings and prepare consolidation proposal
- Present the available options and value-add by the firm

Implement

- Provide client with a formal recommendation
- Leverage partnerships for specialized solutions
- Update clients regularly on transfer progress
- Provide strategic portfolio guidance

Optimize

- Conduct quarterly reviews with client
- Review optimal asset allocation
- Optimize distribution strategies
- Provide specialized client support

SCHEDULE A CALL

OUR PROCESS

Global Wealth Management

Assess

- Identify client needs, opportunities and objectives
- Inform client about overseas wealth management options
- Check if client's global assets need special consideration
- Define any vulnerabilities in existing arrangements

Research

- Consider the client’s unique financial situations and goals
- Analyze findings and prepare wealth management strategies
- Present the available options and value-add by the firm
- Establish risk management protocols to safeguard client

Implement

- Provide client with a formal recommendation
- Leverage partnerships for specialized solutions
- Update clients regularly on portfolio performance
- Provide strategic portfolio guidance

Optimize

- Conduct quarterly reviews with client
- Review optimal asset allocation
- Optimize distribution strategies
- Provide specialized client support

SCHEDULE A CALL

Back to top

OUR TEAM

Meet our Cross-Border Wealth Management Specialists

Andoni Yturralde
Co-Founder and Managing Partner

Bio

Fabrice Mercier
Co-Founder and Managing Partner

Bio

Yvonne Basa
Chief Compliance Officer

Bio

Eric Glassbrenner
Senior Investment Advisor

Bio

Andrew Mckay
International Investment Advisor

Bio

Andrew Scibetta
Investment Advisor

Bio

Ian Delector
Senior Investment Associate

Bio

Richard Rebong
Investment Associate

Bio

Arden Santos
Client Services Manager

Bio

Mark Urbano
Client Services Associate

Bio

Hedel Turallo
Client Services Associate

Bio

Grazel Aboulfadam
Office Administrator

Bio

Aris Marquez
Head of Marketing and Creative Director

Bio

Paula Gisala
Art Director

Bio

Dhon Christer Samosa
Digital Marketing Specialist

Bio

Lynyrd Salita
Web and Systems Administrator

Bio

Back to top

GUIDANCE

Insights

Navigating international finance can be challenging, and finding guidance specific to your needs is hard to come by. That is why we consistently furnish our global clients with specialized resources on cross-border wealth management.

Insights Weekly Articles

Weekly articles for cross-border global individuals featuring timely market developments and timeless investing guidance.

READ ARTICLES

Insights Monthly Newsletter

A compilation of timely market updates and timeless investing guidance for our clients' cross-border financial journey.

SUBSCRIBE

Insights Guides

Our comprehensive guides provide strategies that light a path towards our clients' long-term financial goals.

DOWNLOAD GUIDES

Back to top

Why Us

Specialized Solutions

Understanding that each of our global clients has unique financial situations, aspirations, and challenges, we provide overseas wealth management solutions that are tailor-fit to their needs.

Cross-Border Expertise

Our team of experienced advisors possesses in-depth knowledge of the intricacies of cross-border financial planning, ensuring that our clients receive advice in their best interest.

Global Presence

Headquartered in New York with global presence in the United States, Europe, and Asia, we're always well-positioned to help you navigate the complexities of overseas wealth management.

Personalized Approach

We believe in strengthening our advisory relationships with our global clientele, in order for us to provide specialized solutions that are relevant to their financial goals and objectives.

US SEC-Registered

We are a US-based investment advisory firm registered with the US Securities And Exchange Commission that provides comprehensive cross-border wealth management services and international pension management solutions.

Back to top

Our Global Presence

Headquartered in New York with global presence in the United States, Europe, and Asia, our reach extends to wherever your wealth journey has taken you.

CROSS BORDER | WEALTH

VISIT WEBSITE

SCHEDULE A CALL

New York Office

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