

# 49TH PARALLEL WEALTH MANAGEMENT

*From the Desert to the Tundra™*

## Your Personal Cross-Border Planning Checklist

Essential Steps for Managing Your International Financial Life

### Take Control of Your Cross-Border Finances

Living, working, or holding assets across borders adds complexity to your financial life. This comprehensive checklist ensures you've covered all the critical areas—from asset documentation to compliance requirements—so you can navigate international finance with confidence and peace of mind.

#### Map Out All Your Assets

- Where's each asset physically located?
- What are the "situs" rules? (That's legal-speak for which country gets to regulate it)

#### Understand Your Legal Status

- What's your nationality?
- Where are you a resident?
- Where's your domicile?
- These three things can all be different, and they all matter

#### Create Proper Legal Documents

- Wills or trusts that work in each country
- Powers of attorney for different jurisdictions
- Healthcare directives that cross borders

## Think About Gifting Strategies

- Sometimes it's smarter to give assets away while you're alive
- Different countries have different gift tax rules
- In the U.S., you might use 529 plans for education

## Stay Compliant with Reporting

- FATCA (Foreign Account Tax Compliance Act) for U.S. citizens
- CRS (Common Reporting Standard) for other countries
- Missing these reports can cost you big time

## Plan for Your Digital Life

- Who gets your crypto when you're gone?
- What happens to your online businesses?
- Can your executor even access your digital accounts?

### Get Expert Guidance

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### Need Help Getting Started?

Schedule your FREE consultation and let our experts simplify your cross-border planning.

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