

Overview

A&M's Private Client Tax Services team collaborates with high-net-worth individuals, their family offices, and their enterprises in Latin America and globally where they invest. The team provides succession planning, strategic personal tax advice, tax structuring, and M&A services for family office investments, as well as strategic corporate tax planning and institutionalization assistance for invested companies. The team addresses the entire ecosystem, from the individual to the family office and invested companies. Through A&M's various business solution teams and associated business partners, clients can receive a comprehensive range of services beyond just tax planning.

WHO WE HELP

Privately Held Corporations

High-Net-Worth Individuals

Family Offices

Closely-Held Listed Companies

Private Funds

WHY OUR CLIENTS CHOOSE US

Well known: Our team has years of experience in private client services having a well-known reputation in Mexico and Latin America as a trusted advisor to high-net-worth individuals, their family offices and their invested companies.

Trusted partner: We make it our business to know our client's business, providing tailor-made advice and support. We work alongside our clients to drive the most tax-efficient outcomes.

International reach: A&M is a global advisory firm with professionals worldwide who can support business strategies in Mexico and internationally, providing tax advice that involves a multijurisdictional approach.

Immediate insights: From the initial call, we offer clients valuable insights regarding how specific actions, structures, and strategies can benefit their organization due to our extensive experience as a team specializing in private client advisory tax services.

Independence: A&M is not an auditing firm, giving us the freedom to move nimbly without administrative and governance processes blocking the way.

Network: We have ample experience interacting with the Mexican tax authorities, and, because we are embedded in an international tax practice, we can provide multijurisdictional solutions.

THE A&M TAX APPROACH



01

Preparation

A&M will conduct a feasibility tax analysis of the family business and assets to provide a set of alternatives that fit into the family's business plans and needs.



02

Strategy Design

After the client selects an option, A&M creates a detailed roadmap outlining any changes to the proposed tax structure or optimizations to business processes.



03

Implementation

We work with the family office and ultimate beneficial owners to implement all facets of the plan, serving as a one-stop advisor for different services that we coordinate throughout execution.

THE A&M DIFFERENCE

OPTIMIZE TAXES

Through opportunities identified and implemented during the process, clients can save on taxes in certain areas of their business.

MITIGATE EXPOSURES

Choosing an appropriate tax structure can reduce the risk of non-compliance with tax obligations and audits.

ACHIEVE GOALS

Private clients have personal goals, and A&M helps them achieve these through sound planning. This often leads to faster realization of goals and long-term security of assets and investments using customized solutions.

SUCCESSION PLANNING SOLUTIONS

Combining the bespoke needs of the family business with best practices, we help clients settle on solid succession plans to ensure a successful future for the enterprise and the next generations.

PROTECT ASSETS

Designing and implementing new structures can help diversify or reduce relevant country risks.

SET-UP FAMILY OFFICES

We help our clients design, develop and implement family office structures that will allow them to focus on the primary business while the family office oversees and grows side or alternative businesses.

CONTACT US



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ABOUT ALVAREZ & MARSAL

Founded in 1983, Alvarez & Marsal is a leading global professional services firm. Renowned for its leadership, action and results, Alvarez & Marsal provides advisory, business performance improvement and turnaround management services, delivering practical solutions to address clients' unique challenges. With a world-wide network of experienced operators, world-class consultants, former regulators and industry authorities, Alvarez & Marsal helps corporates, boards, private equity firms, law firms and government agencies drive transformation, mitigate risk and unlock value at every stage of growth.

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