

ALVAREZ & MARSAL TAX APAC -**FUND FORMATION AND FUND** REPORTING SERVICES

OUR SERVICE OFFERINGS

Fund formation support from a tax perspective, including designing the fund structure and reviewing fund documents

Advice on tax issues relating to the fund manager vertical, including planning/optimizing carry structures for principals and employees

Advice on achieving an optimal capital structure to meet the overall repatriation objectives of investors in a tax-efficient manner

Fund transaction support with respect to acquisitions and divestments globally, including structuring and due diligence

Tax incentive planning and applications for funds and managers, including assistance with incentive related annual reporting requirements

> End-to-end technology-driven tax compliance, reporting, and dispute resolution services for funds and fund managers across APAC

Support with transfer pricing (TP) planning and documentation for fund managers and sub-advisors to ensure there is a robust operating framework

FATCA and CRS support, encompassing advisory as well as a full suite of compliance and reporting services

Full spectrum of technologydriven solutions combined with deep sector knowledge

Advice on fund governance protocols to ensure compliance with substance requirements for tax residency and/or treaty claims for funds and/or investment holding companies

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About Alvarez & Marsal Tax

Alvarez & Marsal Tax, part of Alvarez & Marsal (A&M), a leading global professional services firm, is an independent tax group made up of experienced tax professionals dedicated to providing customized tax advice to clients and investors across a broad range of industries. Its professionals extend A&M's commitment to offering clients a choice in advisors who are free from audit-based conflicts of interest and bring an unyielding commitment to delivering responsive client service. A&M Tax has global presence in major metropolitan markets throughout the Americas, EMEA, and APAC.



