

Stephen Nerland

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Stephen is a consultant in the private client and tax team.

Stephen provides individuals, families and family offices with advice on US taxation and succession planning. He also advises trustees (both private and professional), settlors and beneficiaries on US taxation and the exercise of their powers, duties and rights under all forms of trust structures, both onshore and offshore.

He lives in London and has experience in assisting clients located in Africa, the Middle East, Europe and the UK. All of his clients are international in nature, but with a connection to the United States in some shape or form. A typical client (if such a thing exists) would receive assistance with respect to the issues that arise where there is a diversity of fiscal statuses amongst family members including both US and non-US citizens or residents; however, he also assists entirely non-US families or family offices but who need advice in relation to the ownership of assets in the US.

In addition to providing advice on US taxation matters, Stephen specialises in the establishment of structures (typically including trusts, foundations, companies and partnerships) for the protection and preservation of assets across multiple generations. Stephen advises clients on complex governance issues, including structures with family involvement in the ownership, decision-making, and succession planning. Stephen also supports families and family offices in making direct investments, typically when they are buying companies, funds, or real estate, but also with personal use assets and collectibles.

Stephen has an abundance of experience assisting individuals on changes of residency. Whether it is pre-arrival planning, departure strategies, the renunciation of US citizenship or the acquisition of a new citizenship, Stephen assists these internationally mobile individuals and families mitigate the tax and legal issues that arise when moving.

Admissions

Florida, 2010

Education

Saint Michael's College, B.Sc. Business Administration, summa cum laude

University of Miami, J.D cum laude, LL.M (Taxation)

Languages

English

Key dates

Year joined: 2013

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