Tax Planning for High Net-Worth Individuals Training Course

Professional Development Training Course Outline

Category	Taxation and Revenue	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Tax Planning for High Net-Worth Individuals (HNWIs) Training Course provides a comprehensive overview of sophisticated tax strategies aimed at protecting, managing, and enhancing wealth in today's complex global financial environment. It examines the principles of effective tax planning within personal and family wealth structures, including trusts, estates, investment portfolios, and cross-border holdings. Participants will gain insight into minimizing tax exposure through legitimate planning techniques, while maintaining full compliance with domestic and international tax laws.

The course also explores the relationship between tax efficiency, asset protection, and long-term wealth preservation, focusing on how HNWIs can align their financial goals with evolving global tax regulations. Key topics include residency and domicile considerations, inheritance and gift taxation, investment diversification, and the use of offshore structures within compliant frameworks. By the end of the training, participants will be equipped to develop and implement personalized, tax-efficient wealth strategies that balance global compliance, risk management, and sustainable financial growth

Programme Curriculum

Tax Planning for High Net-Worth Individuals Training Course

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Course Objectives:

By the end of this course, participants will be able to:

1. Understand key taxation principles applicable to high-net-worth individuals (HNWIs).
2. Design and implement tax-efficient strategies for wealth accumulation and protection.
3. Apply effective income, capital gains, and inheritance tax planning methods.
4. Evaluate international trust and foundation structures for asset protection.
5. Manage cross-border tax exposures and avoid double taxation.
6. Analyze global mobility and residency planning opportunities.
7. Assess offshore structures in line with international compliance frameworks.
8. Integrate philanthropy and social impact into tax planning.
9. Apply tax planning techniques to digital assets and alternative investments.
10. Develop strategies for ethical and compliant tax optimization.
11. Navigate audits, disclosures, and tax risk management.
12. Incorporate family governance into long-term wealth preservation.
13. Align tax planning strategies with global financial and legal objectives.

Target Audience:

- Private Wealth Managers
- Tax Consultants and Advisors
- Accountants and Financial Planners
- Estate and Succession Planning Specialists
- Family Office Executives
- Investment and Legal Advisors
- Wealth Management Professionals
- High-Net-Worth Individuals and Entrepreneurs

Course Duration: 5 days

Course Modules:

Module 1: Overview of HNWI Taxation Principles

- Definition and global characteristics of HNWIs
- Tax residency and domicile implications
- Common personal tax risks and obligations
- Interaction between domestic and international tax laws
- Understanding wealth structuring fundamentals
- **Case Study:** Global comparison of HNWI tax frameworks

Module 2: Income and Capital Gains Tax Planning

- Taxation of earned and unearned income

- Capital gains management and timing strategies
- Deferral and reinvestment options
- Tax-efficient portfolio structuring
- Managing performance and carried interest
- **Case Study:** Capital gains planning for high-value portfolios

Module 3: Estate and Succession Planning

- Estate and inheritance tax principles
- Wealth transfer and gifting strategies
- Use of trusts, wills, and private foundations
- Family governance and generational planning
- International succession complexities
- **Case Study:** Structuring cross-border family estates

Module 4: International Taxation and Offshore Structures

- Offshore companies, trusts, and partnerships
- FATCA, CRS, and beneficial ownership rules
- Tax transparency and substance requirements
- Foreign tax credits and withholding tax reliefs
- Compliant offshore wealth structuring
- **Case Study:** Managing offshore assets for global families

Module 5: Residency, Mobility, and Citizenship Planning

- Tax residency rules and exit taxation
- Managing global relocation tax implications
- Investment-linked immigration programs
- Double taxation treaty optimization
- Strategic use of multiple residencies
- **Case Study:** Relocation and tax restructuring for mobile executives

Module 6: Taxation of Digital Assets and Alternative Investments

- Crypto and blockchain-based asset taxation
- NFTs, art, and luxury assets valuation
- Taxation of hedge funds and private equity
- Anti-money laundering (AML) compliance
- Emerging risks in digital wealth management
- **Case Study:** Tax treatment of cryptocurrency gains

Module 7: Philanthropy and Charitable Giving

- Structuring tax-efficient philanthropy
- Cross-border giving and donor-advised funds
- Social impact investments and blended finance
- Tax incentives and exemptions for charitable donations
- Integrating philanthropy into estate planning
- **Case Study:** Designing a family foundation for global giving

Module 8: Tax Risk Management and Compliance

- Managing audits, disputes, and disclosures
- Global anti-avoidance legislation and GAAR
- Ethics and governance in tax planning
- Risk assessment and reporting frameworks
- Best practices for tax transparency
- **Case Study:** Tax audit and voluntary disclosure strategies

Training Methodology:

- **Instructor-Led Sessions:** Delivered by experienced international tax and wealth planning professionals.
- **Interactive Discussions:** Encourages peer learning and exchange of best practices.
- **Case Studies & Real-Life Scenarios:** Demonstrates the application of tax strategies to real-world wealth management cases.
- **Group Workshops:** Facilitates collaborative problem-solving and decision-making exercises.
- **Simulation Exercises:** Provides hands-on experience in tax planning, structuring, and compliance.
- **Assessment & Feedback:** Enables participants to evaluate learning outcomes and strengthen practical understanding.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.com or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to FINESKILL TRAINING CENTER account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price

07 Sep 2026	11 Sep 2026	Physical	$1,500
14 Sep 2026	18 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$1,500
28 Sep 2026	02 Oct 2026	Physical	$1,500
05 Oct 2026	09 Oct 2026	Physical	$1,500
12 Oct 2026	16 Oct 2026	Physical	$1,500
19 Oct 2026	23 Oct 2026	Physical	$1,500
26 Oct 2026	30 Oct 2026	Physical	$1,500

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

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