Training Course on International Taxation and Global Financial Planning

Professional Development Training Course Outline

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

Course Introduction

The interconnectedness of today's global economy presents both immense opportunities and complex challenges, particularly in the realms of **international taxation** and **global financial planning**. Businesses and individuals alike face an intricate web of ever-evolving tax laws, regulatory frameworks, and cross-border financial considerations. Training Course on International Taxation & Global Financial Planning is meticulously designed to equip professionals with the cutting-edge knowledge and practical strategies necessary to navigate this dynamic landscape, ensuring **compliance**, maximizing **efficiency**, and optimizing **global wealth management**.

Understanding and mastering international tax principles and sophisticated financial planning techniques is no longer optional; it is critical for sustainable growth and **risk mitigation**. From **transfer pricing** and **BEPS initiatives** to **cross-border investment strategies** and **wealth transfer planning**, this program will empower participants to make informed decisions, minimize **tax liabilities**, and strategically position themselves and their organizations for success in the global marketplace. We aim to foster a deep understanding of current trends, emerging regulations, and **digital economy taxation** to ensure participants remain at the forefront of this vital field.

Programme Curriculum

Training Course on International Taxation & Global Financial Planning

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5 days

Course Objectives

This comprehensive training course on International Taxation and Global Financial Planning aims to achieve the following key objectives:

1. Master the **principles of international tax law** and their application in a globalized context.
2. Understand the intricacies of **double taxation treaties (DTTs)** and their impact on cross-border transactions.
3. Develop expertise in **transfer pricing methodologies** and compliance requirements.
4. Analyze the implications of **OECD BEPS (Base Erosion and Profit Shifting) initiatives** and **Pillar One & Two**.
5. Gain proficiency in **Controlled Foreign Corporation (CFC)** rules and **Global Intangible Low-Taxed Income (GILTI)** regulations.
6. Formulate effective **international tax planning strategies** for individuals and multinational corporations.
7. Comprehend the tax implications of **cross-border mergers & acquisitions** and **restructurings**.
8. Explore various **global investment vehicles** and their tax efficiencies.
9. Learn strategies for **international wealth transfer** and **estate planning**.
10. Identify and mitigate **international tax risks** and challenges, including **tax evasion** and **avoidance**.
11. Understand the role of **tax technology** and data analytics in international tax compliance.
12. Develop practical skills in preparing **international tax documentation** and reporting.
13. Stay abreast of **emerging trends** in international tax, including **digital services tax (DST)** and environmental taxation.

Organizational Benefits

- Reduced risk of penalties and legal issues through a thorough understanding of complex international tax regulations and reporting requirements.
- tax planning and structuring leading to minimized tax liabilities and increased profitability across global operations.
- Proactive identification and mitigation of international tax risks, including those related to transfer pricing audits and BEPS challenges.
- Development of in-house expertise to navigate global markets more effectively and capitalize on cross-border opportunities.

- Empowerment of financial and legal teams with critical insights to inform global expansion, investment, and restructuring decisions.
- Robust financial planning strategies safeguarding organizational and individual wealth across diverse jurisdictions.
- Adoption of best practices and technology for efficient international tax and financial management processes.
- Investment in employee skills and knowledge, fostering a highly competent and specialized workforce in a niche, high-demand area.

Target Audience

1. Tax Professionals & Consultants
2. CFOs, Finance Directors, & Managers
3. Legal Professionals
4. Wealth Managers & Financial Planners
5. Compliance Officers
6. Government & Regulatory Officials
7. Entrepreneurs & Business Owners
8. Academics & Researchers

Course Outline

Module 1: Foundations of International Taxation

- Key Concepts & Principles
- Double Taxation Agreements (DTAs)
- Tax Residency Rules
- International Tax Policy Trends
- Introduction to Anti-Avoidance Rules
- **Case Study:** Analyzing a cross-border scenario to apply source vs. residence principles and initial DTA interpretation.

Module 2: Advanced Transfer Pricing Strategies

- Arm's Length Principle & OECD Guidelines
- Methods: Comparable Uncontrolled Price (CUP), Resale Price, Cost Plus, Profit Split, Transactional Net Margin Method (TNMM).
- Functional Analysis & Comparability Studies.
- Transfer Pricing Documentation
- Dispute Resolution & APAs
- **Case Study:** Developing a transfer pricing policy for an intra-group service provider, including documentation requirements.

Module 3: BEPS and the Future of International Tax

- BEPS Actions Overview
- Pillar One: Re-allocation of Taxing Rights
- Pillar Two: Global Minimum Tax (GloBE Rules)
- Multilateral Instrument (MLI).
- Impact on Corporate Structures
- **Case Study:** Assessing the potential impact of Pillar Two on a mid-sized multinational group's effective tax rate.

Module 4: Cross-Border Investment & Financing

- Taxation of International Investments
- Withholding Taxes.
- Cross-Border Financing Structures
- Hybrid Mismatch Arrangements.
- Foreign Exchange Fluctuations & Tax.
- **Case Study:** Structuring a foreign direct investment (FDI) into a new jurisdiction considering DTA benefits and withholding taxes.

Module 5: Global Financial Planning for Individuals

- Expatriate Taxation
- Residency and Domicile.
- International Retirement Planning
- Global Investment Portfolio Optimization.
- FATCA & CRS Compliance
- **Case Study:** Advising a high-net-worth individual relocating internationally on optimizing their global tax position and investment portfolio.

Module 6: International Wealth & Estate Planning

- Cross-Border Estate Taxation
- International Trusts & Foundations
- Succession Planning for Family Businesses
- Pre-Immigration & Expatriation Planning
- Philanthropy & Charitable Giving.
- **Case Study:** Designing an international estate plan for a family with assets and beneficiaries in multiple countries.

Module 7: Tax Risk Management & Compliance

- Identifying International Tax Risks
- Tax Governance & Control Frameworks.
- Tax Audits & Disputes.
- Exchange of Information (EOI)
- Role of Technology in Tax Compliance
- **Case Study:** Developing a comprehensive tax risk matrix for a multinational corporation and outlining mitigation strategies.

Module 8: Emerging Issues & Future Outlook in International Taxation

- Digital Services Taxes (DSTs.
- Environmental Taxation & Carbon Pricing.
- Cryptocurrency Taxation
- Sustainable Finance & ESG Tax Considerations.
- Taxation in Developing Economies
- **Case Study:** Analyzing the tax implications of a company expanding its digital services into a new jurisdiction imposing a Digital Services Tax.

Training Methodology

Our training methodology is designed for maximum engagement, practical application, and effective knowledge transfer. We employ a blended approach combining:

- **Interactive Lectures:** Expert-led sessions covering core concepts, theories, and latest developments.
- **Real-World Case Studies:** In-depth analysis of actual international taxation and financial planning scenarios, fostering critical thinking and problem-solving.
- **Group Discussions & Breakout Sessions:** Collaborative learning environments encouraging participants to share insights and perspectives.
- **Practical Exercises & Workshops:** Hands-on activities to apply learned concepts, including calculations, drafting, and analysis.
- **Expert Guest Speakers:** Insights from leading practitioners, policymakers, and industry specialists.
- **Q&A Sessions:** Dedicated time for participants to address specific concerns and clarify complex topics.
- **Pre-Course Reading & Post-Course Resources:** Supplementary materials to enhance learning before and after the training.
- **Scenario-Based Simulations:** Recreating real-life challenges to test decision-making under pressure.

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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