



**E&G Financial Group LLC** | **2024**  
Profile



# About us:

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We are a boutique accounting and tax services firm highly specialized in international tax planning. We seek to break paradigms by offering complete advice aimed at providing tax efficiency to our clients and facilitating the family succession process. In addition, we provide full support for compliance with tax and legal requirements where the client is a tax resident.

Through a multidisciplinary team composed of investment specialists, international lawyers, accountants and tax experts, E&G manages a portfolio with several clients in both countries.

Our firm offers a complete wealth planning, ranging from inheritance and tax matters, to the elaboration and execution of complex corporate structures involving companies in two or more jurisdictions.

Learn more on our website:  
[www.egfinancialgroup.com](http://www.egfinancialgroup.com)





## Where we are:



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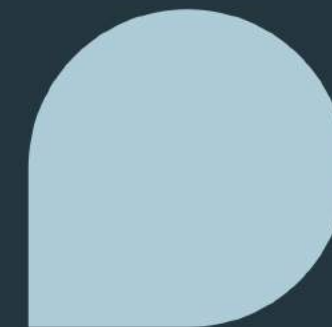




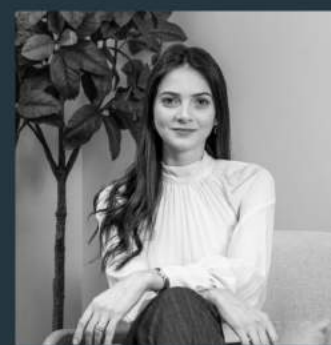
**Simplicity is the ultimate **sophistication.****



# our main leaders



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Estate Planning.  
International Tax Planning.  
Corporate & Fiduciary Services.  
Accounting & US Related Services.

***We make the complex, simple.***



# 1. International Estate Planning



E&G works with our clients to develop a bird's eye view of their assets and the risks they face. This enables us to develop strategies to optimize their wealth holdings, whether personal or business assets or both.

This may entail us advising on establishing trusts, foundations or corporate entities for owning those assets or mitigating any identified risks, or it may involve us advising on putting in place appropriate testamentary documents in certain jurisdictions.

Where structures exist, we may advise on performing a holistic review of a structure from a number of perspectives and across multiple jurisdictions to ascertain the effectiveness of a current strategy, with the aim of putting in place a more appropriate one going forward.

***We provide the most comprehensive and tailored solutions.***





## 2. International Tax Planning

E&G is expert in advising on cross border tax issues impacting on clients, their businesses and their wealth holding structures.

We advise on pre-immigration tax strategies, international real estate investments, global income tax exposure and estate and inheritance tax mitigation planning.

We have a team of tax experts in Brazil and the US, covering complex issues such as anti-deferral regimes governing companies and trusts outside the US. In the same sense, we have experience in advising on the tax treatment of international trusts (such as foreign grantor and non-grantor trusts).

As part of our cross-border estate planning offerings, we advise on US and Brazilian tax compliance.



### **3. Company Formation in the USA**



✓ **No hidden fees.**

✓ **No Visa, Passport or  
Social Security  
Number required.**

✓ **Company formation in all  
50 states, 100% online.**

E&G Financial Group provides LLC and Corporation formation in the US, 100% online. Just get in touch with one of our associates, fill out the application form below, and we'll take care of the whole process for you.



US Company Formation





## 4. Offshore Company Formation

We have extensive experience in incorporation and annual maintenance of companies, trusts, and foundations in 20 jurisdictions in addition to the United States of America:

**Bahamas, Barbados, British Virgin Islands, Cayman Islands, Cyprus, Curacao, Hong Kong, Isle of Man, Cook Islands, Guernsey, Luxembourg, New Zealand, Malta, Nevis, Panama, Seychelles, Singapore, Switzerland, United Arab Emirates and United Kingdom .**

\*\* Offshore company formation process is carried out remotely, with assistance in English, Portuguese and Spanish.



## 5. Company Formation in Brazil



E&G offers the formation of Limited Liability Companies (**Limitada**) and Corporations (Sociedades Anônimas) in all Brazilian states, 100% online. In addition, we help foreign investors to open their Brazilian corporate structures with the best tax efficiency.

Brazil laws state that a company needs just one shareholder to establish a **Limitada**. You must file the Articles of Organization — locally known as Contrato Social — by complying with regional registration requirements. The filing of the Social Contract is done with the State Board of Trade (Junta Comercial Estadual).

**NOTE:** Corporate documents must be prepared in Portuguese. E&G has experience in the preparation and filing of articles of organization of Brazilian companies.





## 6. International Accounting & US Related Services

- Preparation of financial statements for international and US entities according to IFRS.
- EIN (Employer Identification Number) application.
- ITIN (Individual Taxpayer Identification Number) application.
- Completion and submission of the FBAR (Foreign Bank Account Report).
- Resident and Non-Resident Individual Income Tax Return (1040 and 1040-NR) in the US;
- Individual Income Tax Return in Brazil;
- Corporate Income Tax Return in the US and Brazil;
- Domestication of companies to another US state and opening of branches;
- Amendments and Dissolution of companies in the United States and Brazil
- Quit Claim Deed;
- Internal Revenue Service (IRS) Form W8-BEN and W8-BEN-E;
- Obtaining CNPJ (Brazilian EIN) for foreign companies;
- Declaration of Definitive Exit for tax purposes from Brazil and Brazilian Capital Abroad Report (DCBE).



***Tailor-made international solutions.***



