



TAYLOR *and* TAYLOR  
FINANCIAL SERVICES USA LLC



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## Services



### [Cross-Border Financial Planning \(/what-we-do/cross-border-financial-planning\)](/what-we-do/cross-border-financial-planning)

This is the heart and foundation of our service proposition to our clients. Through our "Life-Centered Financial Planning" approach, we aim to bring clarity and understanding.



### [UK Pensions / SIPPS / QROPS \(/what-we-do/uk-pensions-sipps-qrops\)](/what-we-do/uk-pensions-sipps-qrops)

We are a comprehensive Lifestyle Financial Planning firm who specialise in British expatriates living in America and regularly advise on UK pensions



### [US-UK Investment Management \(/what-we-do/us-uk-investment-management\)](/what-we-do/us-uk-investment-management)

We manage client assets in a variety of vehicles, both US and UK based, as part of their overall financial planning. We keep it simple. As simple as possible.

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**We're British Expats, Just Like You**

**(<https://taylortaylorusa.acuityscheduling.com/schedule.php?appointmentType=4255853>)**



As a virtual firm, we can meet with you no matter your location or time zone.  
(<https://taylortaylorusa.acuityscheduling.com/schedule.php?appointmentType=4255853>)

SCHEDULE A CALL ([HTTPS://TAYLORTAYLORUSA.AS.ME/INTRO-CHAT](https://taylortaylorusa.as.me/intro-chat))

## The Best of Both Worlds



(</who-we-are/taylor-usa>)

### Taylor & Taylor USA (</who-we-are/taylor-usa>)

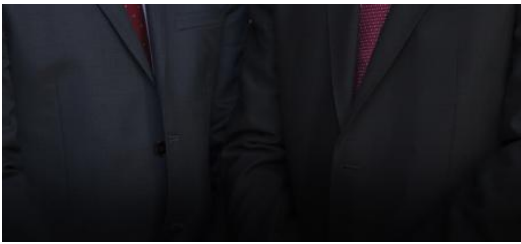
British expats, just like all our clients, we believe that this, along with our genuine commitment to offering a financial planning service whose value far outstrips the cost, and deep technical expertise in relation to our client niche (British expats in America), is what gives us the right to state that we are the best place for any fellow British expat to...



### Taylor & Taylor UK (</who-we-are/taylor-uk>)

The original T&T - Chris on the right and Ross on the left. T&T UK began life in 1993 in Bolton, where it still operates today. The business is in the





process of being transitioned to Ross who made a career switch from EY, where he had qualified as a Chartered Accountant in their Tax Division, and joined Chris in 2016.

[\(/who-we-are/taylor-uk\)](/who-we-are/taylor-uk)

## Taylorred Money Blog

[British Expat in the USA: UK State Pension \(/blog-01/british-expat-usa-uk-state-pension\)](/blog-01/british-expat-usa-uk-state-pension)



**Reading Time: c.7 mins**

We often find that British expats are surprised to discover they still qualify for a State Pension (SP) in the UK. If you worked in the UK for at least 10 years (and paid National Insurance contributions during that time) then you will qualify for the SP, even if you “opted out” as part of your workplace pension. As a side note, if you opted out, you did so out of something known as SERPS and/or the State Second Pension – you cannot opt out of the SP.

[Read More \(/blog-01/british-expat-usa-uk-state-pension\)](/blog-01/british-expat-usa-uk-state-pension)

[QROPS USA - Malta MFSA Regulatory Changes Regarding QROPS Advisors \(/blog-01/qrops-usa-malta-mfsa-regulatory-changes-regarding-qrops-advisors\)](/blog-01/qrops-usa-malta-mfsa-regulatory-changes-regarding-qrops-advisors)



**Reading Time: c.3 mins**

Malta's 2018 new framework for managing QROPS pensions comes into force on 1 July 2019). The Malta Financial Services Authority (MFSA) issued tighter rules stating QROPS advisers must be licensed and regulated in the same jurisdiction as where the QROPS member (i.e. client) is based. These new rules are designed to make the sector more resilient says the Malta Association of Retirement Scheme Practitioners (MARSP).

[Read More \(/blog-01/qrops-usa-malta-mfsa-regulatory-changes-regarding-qrops-advisors\)](/blog-01/qrops-usa-malta-mfsa-regulatory-changes-regarding-qrops-advisors)



**Reading Time: c.5 mins**

A lot has, and has not, happened in the UK since 2016. We have had 3 Brexit Secretaries, 3 extensions, onto the 3rd Prime Minister, into the 3rd year since we revoked Article 50 and, as it stands, those numbers could all double and the UK could be no closer to agreeing how and when they exit the European Union. After all, the UK is only attempting to agree a deal on the terms to begin the 'transition period'.

[Read More \(/blog-01/uk-brexiteit-3-years\)](/blog-01/uk-brexiteit-3-years)

## ADDITIONAL INFO

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## CONTACT INFO

📍 [411 Theodore Fremd Ave, STE 206 SOUTH, Rye, NY 10580](#) (<https://goo.gl/maps/bRnXHzU1yWp>)

✉ [info@taylortaylorusa.com](mailto:info@taylortaylorusa.com)  
(<mailto:info@taylortaylorusa.com>)

☎ Phone: [646-201-4865](tel:646-201-4865) (tel:646-201-4865)

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