



REGISTRATION FINANCIAL ADVISORS

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## Living and working abroad comes with many challenges including opening U.S. investment accounts

- Separation From Family and Familiarity
- Tax & Money Laundering Laws
- Myriad of Other Investment Issues

While technology is making it increasingly easy to stay in touch with loved ones back home, staying connected to “traditional American life” is increasingly difficult. Moreover, those back in the states find it difficult to understand the lifestyle or the complexity that comes with living and working overseas.

The separation from family and familiarity are only a few of the challenges you face. The reality is that when trying to open investment accounts with US institutions, the challenges extrapolate. Increasing tax and money laundering laws combined with the near impossibility of opening investment accounts from overseas makes being able to invest your hard earned dollars problematic.

Living and working abroad can be a very exciting time in your life. It can, as well, come with many challenges. Some of these obstacles are learned and can be overcome with time, such as language barrier, the cultural customs, or the local rules and regulations. And some can be more daunting, such as investing your hard-earned dollars back home in the states due to U.S. laws and regulations like the Patriot Act. Thankfully, with over 40 years of experience, we’ve been able to build tenured relationships with stateside custodians, allowing us to open accounts for U.S. citizens living and working abroad.



Because of our back to back years of recognition by the Barron’s Top 100 Independent Financial Advisors list, we’ve had the pleasure of employing a team of international experts that have been helping expatriates overseas for over 40 years.

Your world wide location presents its own set of unique circumstances and challenges.

We use technical and analytics ‘cookies’ to ensure that we give you the best and most relevant website experience.

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## Europe

[Do you understand the laws and regulations that you must face living abroad, for both your home country and your host country?](#)

[Do you have trouble opening accounts with your foreign address?](#)

[Do you feel you only have access to high-cost investment options?](#)

[Is it important to you to have an in-region advisor?](#)

[Learn more](#)

- **Middle East**

[Do you find living in the Middle East highly prohibits your investment choices?](#)

[Do you need more than simple investment management?](#)

[Do you need help preparing for the costs associated with final repat to your home country?](#)

[Is it important to you to have an in-region advisor?](#)

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- **North America**

[Have you spent your working years accumulating your retirement wealth, but now need help?](#)

[Do you need more than simple investment advice, and are looking for a comprehensive solution?](#)

[Do you face unique circumstances and require a personalized plan to navigate your financial future?](#)

[Learn more](#)

These challenges are not new to Reilly Financial Advisors. We understand these unique issues, and our team of experts has been dealing with them since 1975. Many advisors will tell you that they can work with expats, but the truth is that **nobody** specializes in expat clients quite like Reilly Financial Advisors does. Our experience, education, and size allows us to be able to offer you the breadth of services required to help successfully navigate retirement.

Our comprehensive approach to wealth management is critical to helping expat clients understand how their unique living situation aligns with their goals for retirement.

- [Investment Management](#)
- [Financial Planning](#)
- [Tax Planning](#)
- [Estate Planning](#)

## **Why RFA?**

This integrated solution to wealth management services is provided to our clients for one flat fee, with no commissions, and Reilly Financial Advisors acts in a Fiduciary Standard, putting the best interest of our clients before that of our own.

From preparing clients for retirement to providing Cost of Living data annually, our breadth of knowledge and unique

We use technical and analytics ‘cookies’ to ensure that we give you the best and most relevant website experience.

# Get In Touch

Reilly Financial Advisors is dedicated to your success overseas.

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