



Smart Tricks for U.S Expats who Keep Investments in the States

- * Do all your mutual fund investing in America so you don't have PFIC problems.
- * Work with a U.S. firm that has experience with cross-border clients and won't close your account.
- * Make sure you can clearly identify yourself and have a relationship with the advisor. This avoids problems when clients die and the firms in the States don't know who they are.
- * Figure out what services you need from an American firm, and what you will get in Israel (or wherever you live). See: <http://profile-financial.com/How-to-open-a-US-brokerage-account>.
 1. Advice – licensed in both countries
 2. Clearing/custody
 3. Checking
 4. Debit card
 5. Online viewing and/or trading
 6. Transferring money

- * Multicurrency (www.profile-financial.com/multicurrency)

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