Services for Entrepreneurs

clients
we are passionate about our clients

technical
we value technical excellence

deliver
we deliver on our commitments

teamwork
we respect and collaborate with each other through teamwork

vision
we embrace the vision

The US Tax & Financial Services specialist team of cross border advisors provides tax advice, guidance, planning and compliance services for individuals, partnerships, corporations, trusts and estates for anyone subjected to the US tax system, wherever they may be in the world. Established more than 25 years ago, US Tax & Financial has offices in London, Zurich and Geneva with clients in more than 32 countries.

US TAX

We Support Entrepreneurs

Following the innovative game changers and global digital revolution of the last 20 years, entrepreneurs launching start-ups have literally changed every aspect of our lives. From Amazon to Google to iPods and smart phones, from social media to Air BnB and Uber – ambitious people from around the world with just an idea, have used new technology to disrupt and change the global marketplace. We live in a time where any business has unprecedented opportunities to reach new markets.

Ready for Global Growth?

With its large consumer market, world-class talent network, vibrant support infrastructure and large pool of capital, the United States remains one of the most attractive markets for any start-up that wants to ‘go global’. From our company headquarters in London we have witnessed this revolution enthusiastically engage the UK and beyond during the last three years in a thriving, exciting and vibrant community based outside the Silicon Valley.

US Expansion Support

We are proud to actively support the start-up community in London and throughout Europe. Passionate entrepreneurs often look to the United States as a key place to fuel their next stage of growth.

We advise entrepreneurs on how to navigate the complex US tax landscape by gaining an understanding of their expansion goals - whether that starts as selling products and services to US customers, opening offices on the ground or obtaining US investment.

Considering the multi-state landscape of the US market, we develop a tax structure that will:

- Lower tax exposure to the parent company
- Minimize the group's overall tax liability
- Determine US Effectively Connected Income and sources of income
- Assist with transfer pricing
- Assess state tax liability
- Analyze Permanent Establishment position

We also:

- Advise on cloud service implications
- Advise on locations of servers & IP
- Provide reporting

We have a dedicated team of experts that have extensive experience with treaty law to ensure our clients gain double taxation relief.

We partner with leading industry professionals to help emerging companies start with the right foundation to support their dreams. We are often found participating at tech events with innovators and accelerators.

We provide 1-2-1 mentoring consultations at these events allowing entrepreneurs a valuable opportunity to discuss the particulars of their expansion goals and initiate the guidance needed for their next step. Check our website for upcoming events.

We Support the Funds Who Invest

We have a dynamic funds practice working with some of Europe's most influential Venture Capital clients who invest in fast growing tech start-ups and emerging companies as part of their portfolios.

However, as the United States continues to be a favorite location for investors, investment returns can be seriously reduced with poor US tax planning or a lack of understanding of the Internal Revenue Code. For the US investors who wish to venture into the international markets, the US tax system has reporting requirements for the investor that can be costly and an administrative burden. As US tax specialists we work with fund administrators to ensure the filing requirements of GPs and LPs are met.

We have a highly experienced and dedicated team of fund-focused tax professionals with a proven track record of delivery spanning almost 30 years, doing US tax planning and compliance from our European offices headquartered in London.

We work with many different types of funds including:

- Private Equity Funds
- Venture Capital Funds
- Hedge Funds
- Real Estate Funds

Whether you are looking to establish a new fund, raise capital, satisfy US reporting requirements, plan an exit, or do business in the US, we can proactively help you with a personalized service at every stage of the lifecycle.

Meet Our Team

NORA ROTHROCK

Group Managing Director

Nora is a commercially-focused senior management executive with extensive experience in Pan-European and US strategy, digital transformation, business development, brand building and operational management, working for entrepreneurial growth and global media companies, including senior roles at MTV, Virgin, Live Nation and the Daily Mail, beginning with Arthur Andersen. Nora advises emerging and transitional companies on growth strategies and management structures. Co-founder of Artist Underground, one of the web's earliest sites launching in 1994 and the first 360 degree digital music service for independent artists in Internet history.

BRADLEY ALBIN

International Corporate Tax Director

Brad is a lawyer with over 15 years' US domestic and international tax experience. He advises on corporate structures, private investors, venture capitalists and hedge funds. He has Big 4 experience in both the US and Europe working with large multinational companies as well as fast growth companies on US corporate and international tax topics, both inbound and outbound. At PwC, working in Silicon Valley, he assisted in the due diligence process and structuring of acquisitions for clients ranging from start-ups to Fortune 500 companies and large venture capital firms. He regularly mentors early stage companies.

JONATHAN TIEGERMAN

Senior Tax Manager

Jonathan has eight years' experience (inc. Big 4) advising private equity, venture capital and hedge funds concerning US tax planning initiatives. He provides advice on cross-border merger and acquisition transactions and now focuses on the private equity industry, including the US tax treatment of various financing arrangements and financial products. He advises clients on tax efficiency within global supply chains and aligns the tax function with global business objectives. Jonathan, located in our Zurich office, also consults extensively on the application of FATCA and international reporting requirements incident to US regulatory law and Inter-Governmental Agreements.

DAVID M. DALEY

Private Client Tax Director

Dave has over 20 years' tax consulting experience. As a tax partner with Arthur Andersen Dave had overall responsibility for delivering tax and financial consulting and compliance services to clients ranging in size from start-ups to multinational public companies. He assists businesses in all areas of tax and financial planning including inter-company pricing studies, multinational tax planning, mergers and acquisitions, compensation and benefits, financial aspects of bankruptcy, and utilization of acquired net operating losses.

ANDREW ALDRIDGE

Tax Director

Andrew has over 40 years' domestic and international tax experience. Prior to joining US Tax & Financial he served as Manager of the Tax Department of Commercial Financial Services, Inc., a major debt resolution company in the US, where he was responsible for the worldwide tax affairs of the company. He also worked for over 18 years with Phillips Petroleum Company, a Fortune 50 energy company, where he served in both the tax and legal departments. During this time he spent over five years in the UK as Tax Counsel for Phillips, focusing primarily on international financing issues. Andrew's focus is primarily on international income tax and trust and estate planning for US Tax clients.

Our Participating Network:

COMING TO AMERICA FRIED FRANK TECHNOLOGY · LONDON TECHNOLOGY WEEK · VENTUREFEST SCOTLAND 2015 · swedish beers · L39 · web summit · SELECTUSA · wework · Seedcamp