



MOWERY &
SCHOENFELD
International Tax & Advisory





YOUR TRUSTED GLOBAL ADVISOR

Mowery & Schoenfeld International Services is committed to empowering our clients' transformative, international growth with a keen understanding of foreign tax regulations and cross-border transactions.

For growth-minded organizations looking to expand their business internationally, M&S International Services can offer insights and customized strategies to meet operational, tax, and financial objectives. For individuals who have foreign-held assets or live abroad, you can trust our tax team to smoothly and effectively navigate the complex international tax and reporting requirements.

Our support allows you to stay ahead of the relevant tax jurisdiction laws, rules, and regulations. As a part of Mowery & Schoenfeld, we can help not only with international concerns, but also cross-border structuring and operations, tax, audit, accounting, technology, succession planning, transaction advisory, trust, family office, and wealth management services.

We understand the value of widening access to new markets and increasing diversification, and we're here to help you gain the competitive edge. With Mowery & Schoenfeld International Services, we will work as your trusted advisor to help you operate across international borders.

OUR APPROACH

While we think in terms of “inbound” (for foreign clients operating in the US) and “outbound” (for US clients operating abroad), we understand that for our clients it’s just about solving their international strategic needs, including structuring, supply chain, operations and tax. Whether you are a U.S. company seeking expansion overseas or a foreign investor looking to do business in the U.S., Mowery & Schoenfeld can act as your partner. Our diverse services are designed to create a clear picture of your current circumstances and potential for financial growth.

All of our work is completed within our Firm by licensed CPAs who focus on international tax, structuring, and individual planning needs.



1

DISCOVERY AND SCOPE

Whether you are an individual or a business, our first step is always to get to know our clients and their needs. With this understanding, we will create an engagement that defines the structure of our relationship. Once terms are in place, we are ready to get started!

2

STRATEGY DEVELOPMENT

The next step in our engagement is typically to gather specific data, including information about current cross border activities as well as assets and short-term and long-term objectives. We will also review your current tax position to identify ways to maximize operational and tax efficiencies.

3

REPORT AND RECOMMENDATIONS

Once the evaluation work is complete, we will meet with you to go over different scenarios, as well as make recommendations on how we suggest you proceed. You will receive a report with detailed calculations and action plans.

4

NEXT STEPS

Should you choose, we are always here to help setup a new business, take on your personal or entity tax work, help manage your investment portfolio, or complete a financial audit. However, we are also happy to provide our recommendations to your preferred, existing partners.



OUR SERVICES

At Mowery & Schoenfeld, we offer our clients a one-stop-shop for international accounting services and technical resources. In addition to standard accounting and compliance, we offer advisory services to help you make decisions that align with your overall business goals.



INBOUND

We combine our specialized industry expertise and technical knowledge to build a tax minimization strategy while staying ahead of the of the latest legislative and planning developments.



OUTBOUND

We can help you navigate the formidable challenges of international growth to gain a competitive edge with a myriad of tax, accounting, regulatory, and cultural expertise.



LATIN AMERICA

We identify and implement the appropriate tax strategies and reinforce your efforts to address risk as you widen access to new markets and diversification.



GLOBAL MOBILITY

We work with high-net-worth individuals to ensure we take into consideration global tax planning. This service is important for those with multiple homes, international investments, or global professional operations.



BUSINESS CONSULTING

Regardless of your stage of international growth, we offer non-tax business advisory that caters to your needs. We can help you maximize effectiveness and maintain efficiencies by customizing your products, services, or distributions for global appeal.

INBOUND

SPECIALIZED PLANNING FOR FOREIGN BUSINESSES EXPANDING INTO THE US MARKET

To effectively establish a US presence, non-US-headquartered companies face a complex, high-cost tax system with a wide array of federal, state, and local taxing jurisdictions. Mowery & Schoenfeld International Services can help foreign-based individuals and entities develop cross-border tax planning strategies that are comprehensive and forward-thinking.

Our CPAs and tax advisors combine their specialized industry expertise and technical knowledge to build a tax minimization strategy while staying ahead of the of the latest relevant US legislative, regulatory, and planning developments. Our high-touch philosophy ensures we stay up to date throughout the year on your activities. This keeps you in the best possible tax position. We strive to be with you during decision making, rather than helping you figure out the tax implications afterward.

OUTBOUND

SPECIALIZED PLANNING FOR US BUSINESSES EXPANDING INTO THE FOREIGN MARKET

For businesses with multinational reach, the complexities of foreign tax regulations can feel stifling. International expansion of a US-headquartered company requires in-depth examination of regional regulations and holistic tax planning—all while remaining integrated and flexible to global changes.

At Mowery & Schoenfeld International Services, our team can navigate the international tax responsibility and empower you to access new markets and gain the competitive edge. With an established group of professionals and international connections, we will help you navigate the formidable challenges of international growth with tax, accounting, regulatory, and cultural expertise.

LET US ASSIST YOU WITH:

- Accounting, assurance, and auditing
- Royalty audits
- International tax services and compliance
- Tax planning, including structuring for tax optimization
- Financial reporting and planning
- Human resources functions
- Payroll advisory services
- Establishing bank accounts and facilitating wires
- Management advisory services
- Risk advisory services
- Mergers and acquisitions
- Due diligence
- Succession planning

LATIN AMERICA (LATAM)

EXPANDING BUSINESS IN THE AMERICAS

Entendemos el valor de ampliar el acceso a nuevos mercados, especialmente en América Latina.

For growth-minded organizations, we understand the value of widening access to new markets and diversification, especially in Latin America—a critical market for business clients. Latin America is an attractive market for multinationals seeking acquisitions or investment, and it offers US-headquartered companies supply chain management solutions.

GLOBAL MOBILITY

ADAPTABLE AND FORWARD-THINKING EXPERTISE FOR THRIVING IN THE GLOBAL MARKET

Both individuals and organizations can benefit from the resources (and freedom) that can be found by thinking globally. However, with this movement often comes financial complexity. Let M&S International Services help sort through the red tape of multiple taxing bodies, regulations, and jurisdictions.

Not only can we help you identify the best tax mitigation strategies, but we can also help you execute the regular payments and filings needed.



BUSINESS CONSULTING

FOR NON-TAX BUSINESS ADVISORY

Whatever stage of international growth your business is in, we can help you maximize efficiencies and maintain effectiveness by customizing your products, services, or distributions for global appeal.

For companies in the initial stages of international growth, this might be a strategy dedicated to the oversight of foreign operations that accommodates for limited resources. For companies experiencing substantial success in a limited number of foreign markets who are seeking to expand, we might recommend incremental improvements in localizing the product or service while retaining operational and administrative efficiency.

Regardless of the level of local customization, we will work with you to create a strategy that covers the implications for your business's global structure as well as its intellectual property, operations, and supply chain management.



ABOUT US

Mowery & Schoenfeld, LLC is an accounting, advisory, and IT services firm with offices in Lincolnshire and Chicago, Illinois; Miami, Florida; and Manila, Philippines. Our organization is focused on providing personalized service to each client, building a lasting and trusted relationship. Made up of 20 partners and over 160 total employees, Mowery & Schoenfeld ranks among the top ten firms in Illinois and was recently named one of the largest accounting firms in Chicago by Crain's Chicago Business.

We take culture seriously by providing a supportive environment focused on growth. Our Firm has been named a Best Firms to Work For by Accounting Today, a Best Firms for Women by Accounting Today, and a Best Place to Work by Crain's Chicago Business. Mowery & Schoenfeld offers comprehensive tax, assurance, transaction advisory, outsourced accounting, wealth management, international tax and business advisory services, as well as managed IT services through our subsidiary Xamin, Inc.

Through our M&S Cares program, we prioritize giving back and provide opportunities for our team to support our larger community. We are grateful to be recognized with the Illinois CPA Society's Time and Talent Public Service Volunteerism Award, awarded to only one firm each year.

INTERNATIONAL PARTNERSHIPS

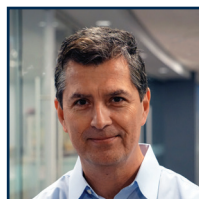
As an active member in the Geneva Group International (GGI), a leading global alliance of professional service firms, we leverage the international capabilities and expertise of our member partners. Managing Partner, Jeff Mowery is the North American chairman of the GGI International Tax Practice Group, and Ricardo Aramburo Williams, Director of LATAM, is the Latin America Chairperson. In 2017, Mowery & Schoenfeld was named Member Firm of the Year.



INTERNATIONAL LEADERSHIP



JEFFERY MOWERY
*Managing Partner,
Founder*



FERNANDO LOPEZ
*International Services,
Partner*



RICARDO ARAMBURO WILLIAMS
*International Services, Principal
Latin America Services, Director*







475 Half Day Road, Ste. 500 | Lincolnshire, IL 60069
311 S. Wacker Drive, Ste. 2650 | Chicago, IL 60606
1111 Brickell Avenue, 10th Floor | Miami, Florida 33131
P: 847-247-8959 | F: 847-883-8704
mllc.com | [@mllccpas](https://www.instagram.com/mllccpas)