CitizensOS

RESEARCH FOR
FINANCIAL ADVISORS

Mobility Assets 101

Where could your clients live if their plans changed?

An advisor's guide to international residency planning.



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MOBILITY ASSETS 101

Inside the full 15-page guide

A household can make a better decision about where to live when it knows who can go, what rights they can use and what it would take to act.

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THE PLANNING QUESTION

Every financial goal has a location.

A financial portfolio diversifies financial exposure. A PassportFolio diversifies geographic exposure.

A household can diversify its investments and still depend on one country for the right to live, work or retire. International residency planning brings that geographic concentration into the financial plan.

Client goal	The planning question	The geography question
Plan B	What could the household put in place now while staying where it lives?	If plans changed, where could each person establish lawful residence, and on what timeline?
Retire Abroad	What would retirement spending, healthcare and taxes look like?	Where could the household live year-round and meet ongoing residence requirements?
Work Abroad	How portable are earnings, benefits and employment arrangements?	Where can each earner legally work, and what does the employer have to approve?

Ask this at the next review

If your plans changed and you needed somewhere else to live, where could everyone in your household go legally?

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Bring the question to a client review.

Read the full 15-page guide for the seven layers of mobility rights, a worked retirement case, and a review workflow for your practice.

Download the advisor guide

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