NOMAD CAPITALIST®

CLIENT CASE STUDY

Leaving UK tax for a *base in Malta*

THE SITUATION

He had spent much of recent years outside the United Kingdom, yet he was still treated as a UK taxpayer. He was ready to leave, but not to swap the UK for another high-tax country.

WHAT HE WANTED

- Become non-resident for UK tax and cut the ties that kept him resident.
- Set up a new tax residence in a better-suited country.
- Have one clear, compliant international structure for himself and his family.

WHAT ELSE HAD TO BE CONSIDERED

He and a family member were beneficiaries of an offshore family trust. Leaving the UK would change how its proceeds and any future distributions were taxed, and nobody had yet set out how. Moving without that answer risked an unexpected tax bill later.

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What we did

1 **UK tax non-residence**

We worked with his own tax advisors on what becoming non-resident required. Over several meetings every question he had was answered, and he received a detailed tax memorandum setting out his position.

2 **Malta Global Residence Programme**

For the new tax home we filed three separate applications for the family. One raised questions about the applicant's personal background. We prepared clear, complete written explanations so the application could move forward.

3 **Trust analysis**

We arranged a detailed professional analysis of how the trust's proceeds and future distributions would be taxed, and what his change of residence would mean for him.

THE RESULT

One coordinated plan instead of three separate problems. The family has a structured route out of UK tax residency, a new tax home under way in Malta, and a clear view of how the trust will be taxed.