



GLOBAL VISION, LOCAL IMPACT

CORPORATE PROFILE



Foresight



ABOUT FORESIGHT

Foresight is a global wealth management company dedicated to providing bespoke financial advice to a select clientele across the world. Our success is built on a foundation of trust, integrity, and an unwavering commitment to the needs of our clients.

We understand that wealth is more than just a number; it's the key to unlock your financial ambitions, securing your future, and leaving a lasting legacy. At Foresight, we are dedicated to help you navigate the complexity of the world, provide you with the personalized strategy you need to achieve your goals and ambitions.

Our mission is to empower a diverse global clientele - including institutional investors, family businesses, and high-net-worth individuals - by delivering tailored, cross-border investment strategies and comprehensive wealth management solutions. We achieve this through a commitment to trust, transparency, and leveraging our unique blend of local market insight and expansive global reach to drive measurable, long-term success.



WHY CHOOSE AN INTERNATIONAL ADVISOR?

Your local broker or financial institutions, while proficient in their local markets, often lack the specialized expertise, international network, and regulatory understanding required to effectively manage the complexities of cross-border wealth management. This can lead to missed investment opportunities in diverse global markets, suboptimal tax planning due to unfamiliarity with international tax laws, and increased exposure to currency fluctuations without adequate hedging strategies.

Furthermore, domestic firms may not offer the same level of privacy or asset protection that international clients often seek, especially when navigating different legal jurisdictions.

Foresight, in contrast, offers a distinct and compelling alternative, providing advantages that a purely local firm cannot match. Foresight's approach is likely characterized by a deep understanding of international financial regulations, access to a broader spectrum of global investment products, and expertise in multi-jurisdictional tax planning.

ACCESS A GLOBAL MARKET

Feature	Local Financial Advisor/Institutions	Foresight's Approach
Investment Scope	Primarily limited to domestic assets and opportunities.	Access to diverse, international investment opportunities, including high-growth Private Equity and Venture Capital in Japan and global markets.
Portfolio Diversification	Risk concentrated within a single national economy and/or currency.	True multi-asset, multi-jurisdictional diversification, mitigating single-country economic and political risk.
Market Insight	Deep, but often insular, focus on local trends and regulations.	"Global Vision, Local Impact": Leveraging intimate knowledge of local regulations and consumer behaviors in Japan, Europe, Americas and Asia, combined with a worldwide perspective on market trends.



EXPERTISE IN CROSS-BORDER COMPLEXITY

The most significant challenge for international investments is navigating the intricate web of global regulations, tax laws, and legal frameworks. Our expertise is specifically tailored to address these cross-border complexities:

- **International Tax Optimization:** We design efficient structures and strategies to legally minimize tax burdens across multiple jurisdictions, ensuring greater wealth preservation.
- **Cross-Border Estate Planning:** We expertly navigate diverse legal frameworks - as demonstrated by our work with clients in Asia and Europe - to structure assets, ensure smooth wealth transfer, and uphold your legacy while adhering to both local and international laws.
- **Regulatory Integration:** We develop personalized plans that seamlessly integrate your existing domestic financial schemes (e.g., pensions) with new international investment strategies, ensuring compliance and security.



OUR COMPREHENSIVE IN-HOUSE SOLUTIONS

Service	Description	Application
Wealth Management	Comprehensive financial planning and personalized investment strategies to grow, protect, and preserve your assets.	Tailored to your global financial picture, considering all international holdings and objectives.
Retirement Planning	Tailored strategies to build a reliable income stream and ensure financial security.	Integrates local pension schemes with global investment strategies, accounting for cross-border tax implications.
Estate Planning	Creating a clear and secure plan for asset protection and wealth transfer.	Specialized in navigating the legal and tax complexities of multi-jurisdictional asset ownership.
Portfolio Diversification	Constructing balanced, multi-asset portfolios seeking consistent, long-term growth.	Access to global asset classes, including Private Equity and Real Estate, for optimal risk-adjusted returns.
Educational Savings Plans	Strategically planning and investing to fund future education expenses.	Advising on the best investment vehicles to meet the rising costs of international universities (e.g., in the US).
Risk Management	Proactively identifying, assessing, and mitigating financial risks.	Addressing risks associated with currency fluctuation, geopolitical events, and international regulatory changes.

A PROVEN TRACK RECORD OF SUCCESS

Our assets under management (AUM) have seen significant growth, increasing from \$680 Million to \$810 Million between 2023 and 2024, a testament to the strength of our investment philosophy and the trust placed in us by our global clientele. Here are some of our happy clients testimonials about their experiences with us over the years:

Securing a Global Retirement

"Planning for retirement while working as an expatriate in the Middle East, with the goal of eventually retiring in Canada, felt like an impossible puzzle. I had pension funds in three different countries and needed a cohesive strategy. Foresight's team developed a comprehensive retirement planning solution that integrated all my existing assets and factored in future currency fluctuations and international tax treaties. Crucially, they also guided me through the intricacies of Cross-Border Estate Planning, ensuring my assets will be transferred smoothly and tax-efficiently to my family, regardless of where we reside. Their expertise in international financial planning is truly second to none." — **Mr. David Chen Senior Engineer, Dubai, UAE**

A PROVEN TRACK RECORD OF SUCCESS

Navigating Complex European Tax Structures

"As a dual citizen living in Switzerland with significant investment holdings across the EU and the UK, my financial situation was a constant source of anxiety due to the ever-changing tax and regulatory landscape. My previous advisors were purely struggled with the cross-border complexity. Foresight's Management team immediately stood out. They didn't just manage my portfolio; they restructured my entire financial life, implementing a sophisticated strategy that is fully compliant in all jurisdictions. Their Global Insight was invaluable, allowing me to diversify into high-growth USA and Asian private equity opportunities that were previously inaccessible. I now have complete peace of mind and a portfolio that is finally working as hard as I do."— **Dr. Elara Schmidt Medical Researcher & Investor, Zurich, Switzerland**

A PROVEN TRACK RECORD OF SUCCESS

Funding Future Generations with Confidence

"As a successful tech founder, my primary financial objective shifted from wealth accumulation to wealth preservation and securing my children's future education. The rising costs of top-tier universities in the US and Europe were daunting. Foresight helped me establish a robust educational savings plan that went beyond simple savings accounts. They advised on the best international investment vehicles to maximize returns while maintaining the necessary liquidity and flexibility. Their strategic approach to wealth growth has given me the confidence that my children's academic opportunities are fully funded, allowing me to focus on my business without financial worry."— **Ms. Anya Sharma Technology Entrepreneur, Singapore**

A PROVEN TRACK RECORD OF SUCCESS

Strategic International Real Estate Investment

"I was looking to diversify my wealth away from the Australian property market and into stable, high-yield international real estate, but the risks felt too high to manage alone. Foresight's investment advisory service was the perfect solution. They identified and managed a portfolio of commercial properties in key Asian markets, providing expert local knowledge that mitigated the risks I was concerned about. Their continuous risk management and transparent reporting have made the entire process seamless. I've achieved a level of diversification and return that I could never have managed through a local broker."— **Mr. Julian O'Connell**
Retired Business Owner, Sydney, Australia

STRATEGIC CAPITAL ALLOCATION: YOUR PATH TO GLOBAL DIVERSIFICATION AND SUPERIOR GROWTH

The most astute investors understand that true financial security and exceptional growth are found beyond the confines of a single national market. While others remain anchored to domestic limitations, you have the opportunity to engage in strategic international capital allocation - a move that is not merely defensive, but profoundly offensive.

This is how you achieve true diversification and unlock the potential for better-than-average returns that a solitary portfolio/market simply cannot offer.

Your wealth deserves a strategy as global as your ambition. The conversation you need to have is not about simple asset management, but about the strategic deployment of your capital to achieve maximum security and outperformance.

We invite you to a confidential discussion with our Foresight advisory team.

This is your opportunity to move beyond the limitations of your home market and secure a financial future defined by global opportunity.

CONTACT US TODAY TO SCHEDULE YOUR COMPLIMENTARY, NO-OBLIGATION CONSULTATION.

Lets begin by asking the right questions about your capital's potential



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