

**Deloitte.**  
Private



Deloitte Private Tax and Legal  
Client Services – Middle East

Empowering your wealth across generations



# Introduction

Across the Middle East, private clients, families and high-net-worth individuals are navigating an increasingly complex environment, both locally and internationally. At Deloitte, we deliver tailored guidance and actionable strategies designed to safeguard your long-term financial security, enhance tax efficiency, and ensure your wealth is thoughtfully structured and maintained for the benefit of future generations.

## Who we are

Deloitte Private Tax & Legal in the Middle East combines deep regional expertise while leveraging the strength of our global network. We support individuals and families with complex cross-border interests and diverse wealth portfolios. By bringing together expertise in tax, governance, and family business, we provide seamless and dependable advice wherever your assets, businesses, or family members are located.

## Our value

We provide comprehensive strategic advice by integrating tax, wealth structuring, estate planning, and family office services in a unified offering. This holistic approach ensures your decisions align with your overall strategy, enabling more effective planning and superior outcomes.

- **Discretion and professionalism:** We are committed to delivering services that are both confidential and professional, while ensuring full compliance with international regulations. This is especially important for families with global interests spanning multiple jurisdictions and asset classes.
- **Long-term, multi-generational mindset:** Our focus is on preserving and efficiently transferring wealth and legacy across generations. We actively support the sustained success of our clients' financial and personal objectives. We adapt our advice to evolving regulations and family circumstances to ensure your legacy endures.
- **Global reach:** Recognizing that investments and assets often span multiple jurisdictions, Deloitte leverages its extensive global expertise to provide clients in the Middle East with seamless end-to-end support worldwide.

# Support framework

Below are the key areas and approaches we use to help families with complex international wealth protect their assets, manage governance, and ensure smooth wealth transfer across generations.

## Family office set-up and transformation

Designing and setting up family offices, along with reviewing and improving governance, operations, reporting, and long-term planning.

## Personal and cross-border tax advisory and compliance

Providing guidance on international tax planning and compliance support for personal income, investments, property, and trusts.

## Succession and estate planning

Helping families transfer wealth smoothly across generations, establishing trusts, foundations, or similar arrangements, and providing advice on wills and inheritance tax.

## Family governance and support

Assisting families with managing governance, clarifying family roles and relationships, resolving conflicts, and protecting both wealth and family unity.

## Business tax and structuring advice

Providing guidance on tax matters across various family business structures to help preserve and transfer wealth efficiently.

## Wealth structuring and asset holding

Advising on how to hold and organize investments and assets, including luxury items, in a tax-efficient way.

## Global mobility

Helping individuals with international ties manage tax residency, travel, property, and economic interests to optimize tax outcomes. We provide guidance on exit taxes, domicile status, remittances and future relocations to ensure full compliance.

## Immigration

Guidance on premium residencies, golden visa and residency by investment routes, along with comprehensive support with the end-to-end process.

## Next generation programs

The Deloitte next generation program, part of Deloitte Private, is designed to equip the next generation of family business and private enterprise leaders with the mindset, skills, and networks needed to lead with confidence in a rapidly changing world. It combines practical insight, peer connection, and global perspectives to help successors navigate leadership, ownership, and legacy with clarity and purpose.

# Contacts

For more information, please contact our Deloitte Middle East team members listed below, who would be happy to assist you with any queries.



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