



# HOW TO PROTECT YOUR ASSETS LIKE A **BILLIONAIRE**

**SPECIAL  
REPORT**

**BY : PEDRO ROBERT**

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HELLO I AM

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Note: If you find this free Special Report to be informative and of value, you're invited to contact me directly at:

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This report talks about the structures by which my colleagues and I have learnt to secure our client's futures and how to protect their assets just like the billionaire's do.

Just as a side note, we also take full advantage of this ourselves!

Our clients and ourselves benefit from:

- Bespoke advice from a team of international experts covering financial planning, tax planning, lawyers, trustees and wealth managers.
- Securing wealth like a billionaire.
- Never be liable for unnecessary taxes totally legally.
- Securing the smooth transition of assets to loved ones without delay.
- Keeping wealth secure from unwelcome prying eyes.
- The knowledge that wealth is protected totally legally without exception.
- Unlike a Will your wishes cannot be contested.

Before we go into the report - there's something you should know...

# **WHY WE'RE PUBLISHING THIS...**

I would like to share what our team have discovered and what we have in common.

None of us were born with silver spoons in our mouths or to put it another way, we come from the school of hard knocks!

Amongst us we have had successful careers in financial services and international banking spanning over 30 years each. We all share a passion for helping others, to protect their wealth and use transparent structures that apply in over 40+ countries.

Now let's get into it.

## **DID YOU KNOW...**

That no matter how astute a business person you are, or how skilled you are as an investor, or how lucky you are with your lottery tickets, it does little good if you leave your assets exposed to attack from a third party?

Let's face it, the more assets you have the more tempting a target you will become.

But this Special Report is aimed at the individual that has created wealth as either a business owner or as a professional or even as a young online millionaire.

For example, there are various methods that business

owners might employ to protect their business assets. But there are also many ways in which these assets can be attacked. Lawsuits could range from sexual harassment, employment discrimination to faulty products.

Whether you have grown your assets and family wealth as an employee or business owner, you will need tried and tested methods to protect your wealth from external attack.

What external attacks to your wealth am I referring to?

Well, they can come from those close to you and those that you would rather not want to see knocking on your front door.

So more exactly let's take a look at one of the greatest potential threat to your wealth – **Divorce!**

This can pose a major threat to your finances for a number of reasons. First of all, your former spouse likely has more detailed knowledge of your total finances than most creditors.

Unlike other creditors, your spouse can break up a retirement plan if this is not structured effectively.

Another difficult circumstance arises when a former spouse is awarded a number of shares in a corporation you own with him or her. In this case, your ex will obtain full access to your books, and is entitled to a dividend whenever you pull money out of the corporation for yourself – despite no longer contributing anything of value to the business.

Here are examples of how we helped:

## **Example One.**

Mrs.T (an offshore based UK business lady) builds a successful business over 20 years.

She has a spouse that has contributed little financially and they have two grown up children living in the UK.

She was approached by a much larger company, to buy her business, for a considerable sum. She accepted the offer and has now sufficient funds to maintain a very good retired lifestyle and help her children onto the UK property ladder.

She invests most of her funds into a MGP Retirement Scheme that invests in a series of funds and investment grade properties. She and her husband stayed in Hong Kong for a further 2 years.

Then Mr. T, believing he can have access to the assets in his wife's MGP Retirement Scheme, decides he wants a divorce and leaves Mrs. T for a much younger alternative. The divorce went through but due to the special nature of the MGP Scheme he was shocked to learn that he could not obtain any of the assets.

This is upheld by High Court judgements and case law.

Mrs. T eventually retired back in the UK to be nearer her children without any concerns over her assets and financial security.

## **Example Two.**

The **taxman!**

There are many ways that the taxman might be hoping to

take some of your wealth. Taxes on income and capital gains, for example, or if you are hoping to pass on your wealth to your loved ones there is the potential liability to inheritance taxes.

But if your assets are structured correctly you need not worry!

Here is another example of how we helped solve a problem:

Mr. S is an UK-expat and married to a non-UK spouse and living overseas. He has investments worth £500,000 and residential investment property in the UK valued at £750,000. Under UK inheritance legislation at the time he consults us, he could only pass £55,000 to his non-UK spouse free of UK inheritance taxes. Any amount over that was liable to be taxed at 40%.

Having established a MGP Retirement Scheme in which he holds his £500,000 and residential investment properties valued at £750,000. When he passes he can now pass on his entire pension held assets to his non-UK spouse without any UK inheritance taxes and she will be able to benefit almost immediately without a need of a lengthy period of probate.

Potential tax saving of £478,000

### **Example Three.**

Mr. H is a successful hedge fund trader based in Hong Kong. He is a UK expat. His bonuses are substantial and he sees himself going back to the UK eventually. He wants to establish a portfolio of investment properties in the UK. A MGP Scheme, which allows such property investments, is established. MGP sources suitable properties for him, which he agreed upon, as he is too

busy. He adds to his MGP portfolio over a number of years. He is aware of all the protective benefits that his MGP Scheme offers him.

He consequently decided to get married. A lot of his friends and colleagues have been divorced in the past. He sees a lot of couples breaking up in a city like Hong Kong. He did not want to have a pre-nup conversation with his bride to be and sought advice from MGP. Happily for him the structure of the MGP Scheme protects his assets from attack if he ever ends up in a divorce court.

## **OTHER POINTS OF RELEVANT INTEREST**

- Many countries have introduced new laws to tax donations to family trusts and/or the subsequent profits of the trust. This has reduced the attraction of a family trust as a way to save for retirement.
- Most countries, in contrast, encourage savings for retirement. There are often tax incentives or at least a tax deferral available for savings through a pension plan.
- Most people realize as well that the rapid ageing population will put a significant strain on public finances. It is inevitable that future governments around the world will have to reduce future government pension benefits AND



raise taxes.

- Many existing retirement plans force members to take pension distributions from a certain age. This is not always prudent because many members are still able to work and many more will require those funds later on because of the longer living expectations and high cost of medical services.

The MGP Scheme makes it a very flexible planning tool.

The key benefits are:

- You will have a ready made team of international experts, that are always up to date on in financial planning, tax planning, lawyers, trustees and wealth managers;
- You will be protected from unnecessary taxes in a totally legal manner;
- You will be able to secure your loved ones financially as you may wish;
- You will be able to keep your wealth confidential;
- You will keep your wealth secure from unwelcomed prying eyes;
- You will be able to sleep well in the knowledge that your affairs are all perfectly legally sound;
- Your wealth will pass on to those you wish without delays or taxes according to your wishes.

We deal with a handful of new clients at a time to ensure both the quality of advice and the building of the most appropriate structure for each client.

Our service is not for everyone and we do have a vetting process in order to provide the best advice to those that can take full advantage of what we can provide.

What our clients tell us how they feel:

- They feel they have a team of international experts working for them;
- They enjoy not having to pay unnecessary taxes;
- They sleep well at night knowing their wealth is protected;
- They feel secure knowing their loved ones are secure;
- They know they are not billionaires but feel like a Billionaire!

So my question remains:

IS YOUR WEALTH PROTECTED LIKE A BILLIONAIRE?

IF NOT, WHY NOT?

If you would like to learn more about how I might be able to help you please email me at:

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I really hope you enjoyed reading this special report and found it of value.

We hope to hear from you soon.

*Pedro Robert*