

# Cawley Advisors Launches Specialised Cross-Border Financial Planning Division to Serve Global Clients

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Cawley

Advisors, a leading financial consulting firm, today announced the launch of its new Cross-Border Financial Planning Division designed to address the complex financial needs of internationally mobile individuals and multinational businesses. The division will begin serving clients effective 1 April 2025, providing comprehensive financial strategies that transcend geographical boundaries.

The creation of this specialised division comes in response to increasing global mobility and the growing complexity of managing finances across multiple jurisdictions. According to recent industry data, cross-border financial assets have grown by 58% in the past decade, with high-net-worth individuals now holding an average of 27% of their wealth in countries outside their primary residence.

"Today's globally connected world demands financial expertise that extends beyond single-country solutions," said Peter Horowitz, senior financial advisor of Cawley Advisors. "Our new Cross-Border Financial Planning Division represents our commitment to providing seamless financial guidance regardless of where our clients live, work or invest. We've assembled a team of international specialists who understand the nuanced interplay between different regulatory systems."

The division has secured necessary regulatory approvals and registrations in key financial markets, including the United Kingdom, European Union, United States, Singapore and Hong Kong. This multi-jurisdictional compliance framework enables the team to provide legally sound advice across major global financial centres while maintaining fiduciary responsibility to clients.

Led by Lauren Sanders, who brings over 20 years of international financial planning experience and holds both the Chartered Financial Planner (CFP) and Chartered Financial Analyst (CFA) designations, the division will offer specialised services, including multi-currency investment management, cross-border tax optimisation, international estate planning, expatriate financial planning and global business succession strategies.

"Cross-border financial planning requires a fundamentally different approach than traditional domestic advising," said Sanders. "Issues like tax treaty interpretation, foreign pension portability and currency risk mitigation require specialised expertise. Our team's collective experience in over 30 countries positions us uniquely to navigate these complexities for our clients."

The division will utilise Cawley Advisors's proprietary International Financial Planning Platform, a technology solution designed to model scenarios across multiple tax jurisdictions simultaneously. This advanced capability allows advisers to identify optimisation

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opportunities that might be missed when analysing finances through a single-country lens.

## Services

will be tailored to address specific client profiles including British expatriates living abroad, foreign nationals working in the UK, multinational business owners, international executives with equity compensation packages and globally mobile families with assets in multiple countries. The team specialises in solving complex challenges like phantom foreign exchange gains, offshore investment structures and treaty-based planning opportunities.

"We've

observed that clients with international financial needs often receive fragmented advice from advisers in different countries who aren't communicating with each other," said Horowitz. "Our integrated approach ensures all financial decisions are made with a comprehensive understanding of their global implications."

The

Cross-Border Financial Planning Division will initially serve clients from offices in London and other prominent European locations. Advisers will also be available across all major time zones to accommodate global client needs.

## About

### Cawley Advisors

Established

in London, Cawley Advisors has cultivated a distinguished reputation throughout Europe, recognised for its nuanced expertise and sophisticated understanding of the complex financial landscapes unique to each country, which significantly influence the daily lives of our clients. Their team delivers unparalleled financial consulting services to both individuals and businesses, strategically tailoring their processes to fit the needs of each client.

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