

HAVELET

ASSIGNMENT COMPANY

About Us

- Havelet is an independently owned assignment company that has been in existence since 2012. Our areas of expertise include tax deferral strategies for US attorneys, their claimants and the sale of real, personal and business properties through the installment and structured sale processes.
- Havelet maintains a permanent establishment in Barbados to take advantage of the benefits within the US Barbados Tax Treaty. These benefits are passed through to our clients, enabling them to put their money to work on a pre-tax, or tax-deferred basis.
- Havelet has no permanent establishment (employees, offices, etc.) in the US and is not subject to the US tax regime. We rely on the US-Barbados Tax Treaty for tax benefits not the IRS tax codes.
- Our attorney and claimant products have independently constructed legal, tax and securities opinions written by pre-eminent law firm Withers Bergman LLP.
- Our real property and business sale products are transacted in conjunction with our client's professional advisors to ensure bespoke and accurate tax planning.
- Havelet utilizes a private placement annuity within our structures to ensure that there is no withholding tax due on US source investment income (article 10.2 of the US-Barbados Tax Treaty). No other provider, domestic or international, appears to address this withholding tax requirement.
- Havelet provides both variable and fixed guaranteed investment options with numerous US annuity providers and has subsequently been vetted and approved to conduct business transactions with these institutions. (Lombard International, Zurich, Morgan Stanley, Fidelity, Goldman Sachs to name a few.)
- All assets are held in the US in segregated client accounts which mitigates potential contamination from any counter-party, client or from Havelet itself.
- Havelet provides a transparent fee structure based on the duration of the contract and the size of the investment portfolio.
- Havelet is independently audited and complies with all relevant US and International tax and regulatory bodies. Our strategies enable clients to defer but not avoid taxation and invest certain assets on a pre-tax basis.
- Advanced tax planning opportunities are available through estate and asset protection strategies.

Havelet Assignment Company Limited
First Floor Limegrove Centre
Holetown St James
BB24016 Barbados

617 418 1828

<http://www.havelet-assignment.com>