JR Wealth Management Publishes Guide to Cross-Border Tax Coordination for Internationally Connected Families

Residency tests, treaty tie-breakers, unclaimed foreign tax credits, and the reporting duties that apply even when no tax is owed.

TORONTO, ON, CANADA, October 30, 2026 /EINPresswire.com/ -- JR Wealth Management today announced the publication of a new article on how families with connections to more than one country can coordinate tax residency, tax treaties, foreign tax credits, and reporting obligations.

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> *Jonathane Ricci, Founder, JR Wealth Management*

The article, "Cross-Border Tax Strategy: Treaties, Credits, and Structures," written by Jonathane Ricci, a wealth-orchestration attorney licensed in New York and Michigan, and published on jrwealthmanagement.com, identifies tax residency as the foundation of cross-border planning, noting that it is possible to satisfy two countries' residency tests at once and that tax treaties provide tie-breaker rules for that situation.

The article describes bilateral tax treaties as allocating taxing rights between countries rather than creating loopholes, and identifies unclaimed relief as a recurring failure: foreign tax credits lost to mismatched timing, incorrect income categories, or returns prepared in each country as if the other did not exist. It also addresses information reporting that applies independently of any tax owed, including the FBAR and FATCA regimes for United States persons and Form T1135 for Canadian residents holding specified foreign property above reporting thresholds.

"The defining risk in cross-border affairs is not any single rule; it is that each country's advisor optimizes locally while the family's position is global," Ricci said. "One professional per country is not a strategy."

The article also notes that changing residence can itself be a tax event, with several countries imposing departure taxes, and recommends analyzing a contemplated move a year or more in advance.

Key themes covered in the article include:
- Tax residency and treaty tie-breaker rules as the foundation of cross-border planning
- Why foreign tax credit relief is so often left unclaimed
- Reporting obligations such as FBAR, FATCA, and Form T1135 that apply regardless of tax owed

This article is published for educational purposes and does not constitute legal, tax, or investment advice. Readers are encouraged to consult qualified professionals familiar with their specific facts. Tax information is general in nature, varies by jurisdiction and individual circumstances, and should not be construed as tax advice.

The full article is available at https://www.jrwealthmanagement.com/blog/mastering-international-tax-strategies/.


Jonathane Ricci, wealth-orchestration attorney and forthcoming host of the UNJUST MATTERS™ podcast.

About JR Wealth Management: JR Wealth Management provides comprehensive, coordinated wealth management services for high-net-worth families and business owners, including Managed Legal Expertise™, the coordination of qualified attorneys and licensed professionals within a client's overall plan. JR Wealth Management does not provide legal advice. Investment advisory services, where applicable, are offered through licensed persons who are appropriately registered. Registration does not imply any level of skill or training.

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