



Deloitte School of Tax Basics of Expatriate Management

With global mobility increasingly being seen as a strategy tool of business, understanding what is involved in moving your people and the impact of this on your business, has become vitally important.

To ensure that your global mobility programme has every chance of success and will support your business, it is essential to understand the different steps that need to be taken over the course of an expatriate's secondment and the planning involved in cross-border movement of your people.

We have the pleasure of inviting you to our Basics of Expatriate Management Workshop. This workshop aims to provide an introduction to global mobility and managing expatriate populations. The Workshop will consider the life-cycle of an expatriate and will outline the activities that comprise each phase of this life-cycle on a high-level basis.

The agenda for the workshop is as follows:

Topic	Content	Timing	
Registration		8:00a.m. 8:30a.m.	-
Introduction	Introduction to global mobility, including common terminology.	8:30a.m. 9:00a.m.	-
What is the life cycle of an expat?	<ul style="list-style-type: none"> • Introduction to the expat life cycle 	9:00a.m. 09:15a.m.	-
Assignment Planning	<ul style="list-style-type: none"> • Considering the strategy of moving people and the overall view of the mobility programme. 	9:15a.m. 09:30a.m.	-
Pre-assignment period	<ul style="list-style-type: none"> • What needs to be considered when planning a specific expatriate's assignment? • What are the different deployment models? • What employment components make up these models? • Tax equalisation / Tax protection. 	9:30a.m. 10:15a.m.	-
Tea – 15 Minutes			
Assignment period / On assignment	<ul style="list-style-type: none"> • What are the considerations that need to be dealt with while the expatriate is on assignment? • For example: <ul style="list-style-type: none"> ○ Relocation considerations ○ Taxation of expatriates <ul style="list-style-type: none"> ▪ Residency / Source ▪ Tax treaties ▪ Credits and exemptions ▪ Gross-up ▪ Employees' tax and shadow payrolls 	10:30a.m. 11:45a.m.	-
Repatriation / Post assignment period	<ul style="list-style-type: none"> • What are some of the key factors that make a successful assignment? • Why do assignments fail? 	11:45a.m. 12:20p.m.	-
Wrap-up & Questions			

Facilitators:

Matthew Hart is an Associate Director in the Deloitte Tax Global Employer Services team. He has had over 12 years of experience in tax, including experience in individual and expatriate taxation, employees' tax and global employee share plans. He has had four and a half years of experience in London with Deloitte's Global Share Plan team before returning to Johannesburg in 2013.

Janet Pavey is a Manger in the Deloitte Tax Global Employer Services team. She has over 10 years of experience in tax. Of this, she spent over five years specialising in individual expatriation tax and employees' tax, and four and a half years specialising in international corporate tax. She has recently re-joined Deloitte to focus on Global Mobility Transformation.

Date and Venue:

Johannesburg 23 January 2018

Cost:

R1 454 (inclusive of VAT)/R1 275 (exclusive of VAT)

Payment is due after the seminar date.

Company Discount: 10% for 2 or more participants from the same company and region. The discount applies from participant 2 onwards.

Alumni Discount: 10% for Deloitte alumni. This applies if you are a former employee of Deloitte and have registered as Deloitte alumni. ([Click here](#) to register as an alumnus)

You will only qualify for one of the 10% discounts

Cancellation Policy:

Our standard cancellation policy is to invoice 50% of the cost of the workshop for attendance not cancelled within 48 business hours of the planned session date. This is to recover the overhead costs incurred relating to your planned attendance and the cost of the course material.

Time:

8:30 a.m. – 12:30 p.m. (Registration from 8:00)

The course will contribute to **4 hours** CPD/CPE

RSVP:

Please note that we use an online booking system. Kindly complete the online booking form using the link below.

The link will open the booking page of the Deloitte School of Tax but it will not select the course or region for you. Please be sure to select the correct course, date and region from the drop-down menu.

You will be able to register several people using one form. (Please contact us at dsot@deloitte.co.za if you wish to make bookings for more than 20 people at once.)

[Register Here](#)

Course Material:

In the interests of the environment, and to move with technology, this will be a paperless course. We will email you the course material within 48 business hours of the planned session date. You will then have the option to bring the course material on your laptop/tablet, or should you prefer, to print the material. We will have plug points in the venues for laptops/tablets

Contact us:

Should you have any administrative questions regarding this workshop, please contact us at dsot@deloitte.co.za

[Deloitte School of Tax Website](#)

Sincerely,

The Deloitte School of Tax Team



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