



Glenn Gates JD *Principal*

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MEET GLENN

When it comes to tax compliance and planning, there is rarely a bright line between law and accounting, particularly when dealing with international tax matters. Compounding this issue is the need to achieve regulatory compliance in a way that drives personal, business and financial objectives.

Enter Glenn Gates, a highly experienced and respected tax advisor and lawyer with particular expertise in advising clients about the US tax implications of cross-border transactions and multinational operations. Glenn helps a diverse portfolio of clients — individuals, corporations, partnerships and nonprofits — make sound business decisions that achieve their goals.

Clients appreciate Glenn's incisive analysis of domestic and foreign tax issues, and value his pragmatic guidance. And, perhaps most of all, Glenn's clients enjoy his down-to-earth demeanor and quick wit.

BACKGROUND

Glenn has more than 30 years of experience in banking and tax consulting. Formerly with Arthur Andersen, Glenn has been a principal at Edelstein & Company for nine years.

HOW GLENN CAN HELP

- Develop strategies to minimize tax liability for global businesses
- Help expatriates optimize their available US tax benefits, such as the foreign earned income exclusion, the housing exclusion and the foreign tax credit.
- Advise private companies and individuals on a range of international tax matters
- Prepare tax returns to ensure regulatory compliance
- Analyze and advise on transfer pricing strategies

RESULTS

- A US-based technology consulting firm sought Glenn's counsel when they decided to acquire a going concern in the UK. Glenn helped the firm restructure its partnership rather than become a multinational corporation which saved the partners hundreds of thousands of dollars in taxes.
- Glenn helped a multinational corporation determine equitable compensation for its US employees based in other countries by offsetting any financial hardship resulting from having to pay foreign taxes.

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- Glenn helped a nonprofit organization establish foreign operations so that the organization could deliver much-needed services in Guatemala.

OUTSIDE THE OFFICE

I enjoy spending time with family, reading, and relaxing at the lake. Sometimes, if I am lucky, I get to do all three.

EDUCATION

Juris Doctorate, Boston College Law School

Bachelor of Science in Computer Information Services, Bentley University

PROFESSIONAL AFFILIATIONS

Massachusetts Society of Certified Public Accountants (MSCPA)

Massachusetts Bar Association