

Stephen D. Holmes

Registered Foreign Lawyer
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Tax Advisory

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Profile

Stephen Holmes is a Registered Foreign Lawyer in our Hong Kong office. His practice focuses on cross border business tax, securities and business law. His international clients range from governments, trusts, and banks to entrepreneurs.

Stephen has a TEP designation from the Society of Trust and Estate Practitioners and has lectured and written extensively in Europe, Asia and North America in regard to tax, estate planning, immigration and corporate governance.

Prior to joining OLN, Stephen worked at another large National Canadian law firm and subsequently operated his own firm for 34 years.

Representative Work

- Advises financial institutions in Switzerland and Lichtenstein with Canadian depository in regard to voluntary disclosure, compliance and alternatives;
- Assists clients to cease residency in Canada and obtain residency in Malta and Panama;
- Assists clients in regard to minimising global tax through the use of non- resident corporations and treaties;
- Advises clients in regard to the formation of non-resident trusts for estate planning and distribution of assets to Canadians;

- Negotiates for the sale of private companies. Advises in regard to restructuring to optimize after tax sale proceeds through the use of domestic trusts. Protection of intellectual property, employment contracts, shareholders agreements and holding companies.

Areas of Practice

- Tax/Corporate/Securities – international financing, acquisitions and tax estate planning, foreign residency
- acting in regard to numerous sale of assets, shares, franchises, joint ventures, public and private financings, distributions and stock exchange listings
- structuring, forming and use of offshore Trusts, Banks, Foundations and International Business Corporations

International Practice

Assisted clients in legal and business affairs in Mexico, Ecuador, Venezuela, Chile, China, Belize, Peru, British Virgin Islands, Cayman Islands, Barbados, Jersey, Turks and Caicos, Bermuda, Bahamas, Guernsey, England, Austria, France, Japan, Wales, Germany, Scotland, United States, Ireland, Thailand, Gibraltar, Hong Kong, Malta, Panama, Dominican Republic, Turks & Caicos, Dominica, Costa Rica, Honduras, Germany, Denmark, Cuba, Dubai, South Korea, Isle of Man, Poland, Singapore, Belgium, Papua New Guinea and Thailand.

Awards

2014

Global International Awards

Named the 2014 Offshore Trust Lawyer of the Year — Canada

ACQ Global Awards

Named the 2014 Cross-Border Estate Planning Lawyer of the Year — Canada

2013

Corporate INTL

Selected in 2011 as one of the 50 Best Lawyers in Canada for expertise in Tax Planning