

Bermuda | Tax Services

Deloitte in Bermuda - combining insights and innovation with business

Together with the Deloitte member firms, you have access to a global network of tax specialists who can address virtually any tax question that arises.

Deloitte offers clients a broad range of fully integrated tax services. Our approach combines insight and innovation from multiple disciplines with business and industry knowledge to help your company excel globally.

Deloitte provides audit, tax, consulting, and financial advisory services to public and private clients spanning multiple industries. With a globally connected network of member firms in over 150 countries, Deloitte brings world-class capabilities and deep local expertise to help clients in Bermuda.

We Offer

- Business tax - focusing on key industry groups including the (re)insurance industry and asset management, both onshore and offshore
- International tax - providing high quality tax compliance and advisory services both locally and in co-operation with Deloitte offices around the globe
- Transfer pricing
- Tax management consulting - Providing a full range of consulting services on the implications of the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) in Bermuda and other non-US jurisdictions
- Buy-side and sell-side M&A strategy
- Global employer services - providing global employer services to U.S. expatriates residing in



- and/or Bermuda based companies with U.S. employees
- Business process solutions
- Transaction readiness
- Post transaction integration and transformation
- Support quarterly and/or annual tax provision calculations
- Provide tax compliance and consulting services to global asset management clients

Our Network

Deloitte has a strong presence in the Caribbean and Bermuda, with more than 550 professionals dedicated to bringing their talents to bear on our clients' unique issues.

Global Strength. Local Delivery.

Our global presence allows us to complement our local team with the skills and relevant industry expertise of highly qualified professionals across the globe. This enables us to seamlessly perform large and complex cross-border business and transaction issues.

Deloitte Tax Services Team



James Dockeray

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James Dockeray is a Partner in the Bermuda office and the leader of the combined Bermuda and Virgin Islands tax practice of Deloitte. He has gained valuable experience over the past 20 years serving the financial services industry in Canada, Bermuda, BVI and the United States with over 15 years focused in the Bermuda marketplace. He has written numerous articles on US international tax issues covering FATCA, developments in the Insurance Linked Securities market and various issues affecting the (re)insurance and alternative investment industry(s). James has worked with numerous Bermuda, US and European based global investment managers, commercial (re)insurers and captives. James has advised clients on cross border transactions, business and financing structures and assisted clients with US and foreign tax reporting requirements.



Andy DeGregorio

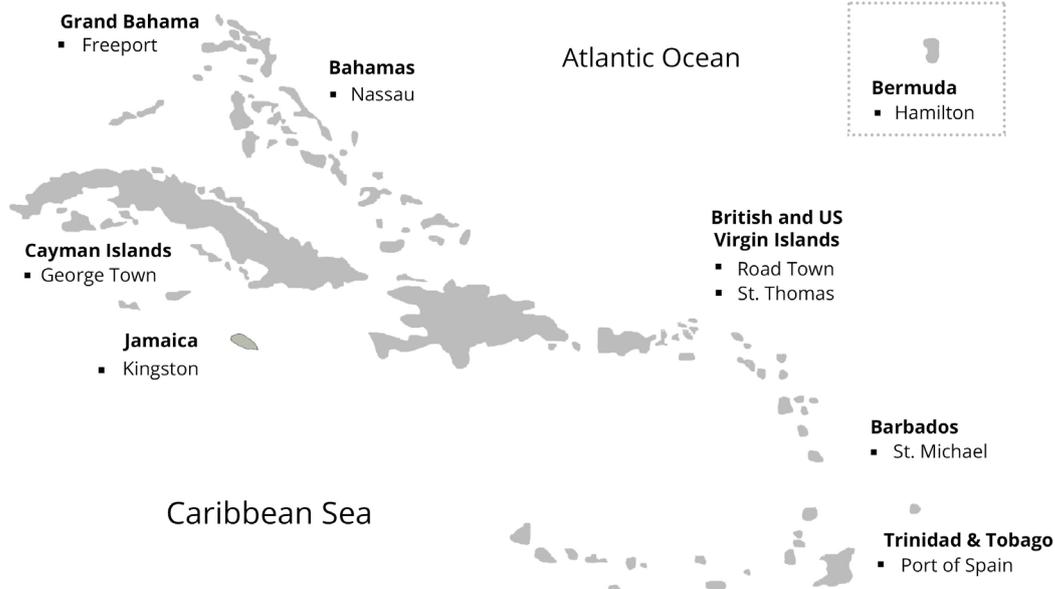
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Andy has over 8 years of U.S. tax experience working with corporate and partnership clients both globally and domestically in the U.S. He has served various clients within the financial services industry including property & casualty insurance, reinsurance, insurance captives, private equity, banks and hedge funds. He has worked on a range of projects including: ASC 740 tax provision preparation and process establishment, financial service company federal tax return preparation, FATCA/CRS entity classification and compliance, and cross-border transactions consulting. Andy has experience in accounting for income taxes, FATCA/CRS, insurance tax advisory services, and US and foreign tax reporting requirements.

Deloitte in the Caribbean and Bermuda



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