Datastat Research
Building Capacity in Training and Research

DATASTAT TRAINING IN

OFFICIAL COURSE PROSPECTUS

Center for Advanced Research & Professional Development

Nairobi Training Center • Global Virtual Academy • Corporate On-Site

TAXATION AND REVENUE

Tax Planning for High Net-Worth Individuals Training Course

Comprehensive Course Syllabus, Practical Modules & Upcoming Schedules

PROGRAM SPECIFICATIONS & HIGHLIGHTS

- **DURATION**
  5 Days Practical Hands-on
- **DELIVERY MODES**
  In-Person Class & Live Virtual
- **CERTIFICATION**
  Accredited Certificate of Completion
- **INTAKES / DATES**
  Multiple Cohort Schedules Included

PREPARED FOR:

Valued Participant

Email: training@datastatresearch.org | Issued: November 21, 2026

Academic & Professional Training Year: 2026

DATASTAT TRAINING INSTITUTE

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Tax Planning for High Net-Worth Individuals Training Course

Taxation and Revenue • 5 Days Intensive • Accredited Certification

Course Overview

Tax Planning for High Net-Worth Individuals (HNWIs) Training Course provides a comprehensive overview of sophisticated tax strategies aimed at protecting, managing, and enhancing wealth in today's complex global financial environment.

Upcoming Training Schedules

Confirmed cohort intakes and venues. Both physical in-person classroom and live virtual online seats are available.

TRAINING DATES	LOCATION / VENUE	FORMAT / DURATION	INVESTMENT (FEE)
29 Dec 2025 – 2 Jan 2026	Nairobi	Classroom / 5d	**$1,500 USD / KES 110,000**
29 Dec 2025 – 2 Jan 2026	Kigali	Classroom / 5d	**$3,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Dubai	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Cape Town	Classroom / 5d	**$4,500 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Addis Ababa	Classroom / 5d	**$3,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Singapore	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Istanbul	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Bangkok	Classroom / 5d	**$5,000 USD / KES 90,000**
29 Dec 2025 – 2 Jan 2026	Accra	Classroom / 5d	**$4,000 USD / KES 90,000**
5 Jan 2026 – 9 Jan 2026	Nairobi	Classroom / 5d	**$1,500 USD / KES 110,000**
5 Jan 2026 – 9 Jan 2026	Kigali	Classroom / 5d	**$3,000 USD / KES 90,000**
5 Jan 2026 – 9 Jan 2026	Dubai	Classroom / 5d	**$5,000 USD / KES 90,000**

* Corporate discounts and customized cohort scheduling are available for teams of 3 or more participants.

Course Curriculum & Modules

Tax Planning for High Net-Worth Individuals Training Course

Introduction

Tax Planning for High Net-Worth Individuals (HNWIs) Training Course provides a comprehensive overview of sophisticated tax strategies aimed at protecting, managing, and enhancing wealth in today's complex global financial environment. It examines the principles of effective tax planning within personal and family wealth structures, including trusts, estates, investment portfolios, and cross-border holdings. Participants will gain insight into minimizing tax exposure through legitimate planning techniques, while maintaining full compliance with domestic and international tax laws.

The course also explores the relationship between tax efficiency, asset protection, and long-term wealth preservation, focusing on how HNWIs can align their financial goals with evolving global tax regulations. Key topics include residency and domicile considerations, inheritance and gift taxation, investment diversification, and the use of offshore structures within compliant frameworks. By the end of the training, participants will be equipped to develop and implement personalized, tax-efficient wealth strategies that balance global compliance, risk management, and sustainable financial growth.

Course Objectives:

By the end of this course, participants will be able to:

- Understand key taxation principles applicable to high-net-worth individuals (HNWIs).
- Design and implement tax-efficient strategies for wealth accumulation and protection.
- Apply effective income, capital gains, and inheritance tax planning methods.

- Evaluate international trust and foundation structures for asset protection.
- Manage cross-border tax exposures and avoid double taxation.
- Analyze global mobility and residency planning opportunities.
- Assess offshore structures in line with international compliance frameworks.
- Integrate philanthropy and social impact into tax planning.
- Apply tax planning techniques to digital assets and alternative investments.
- Develop strategies for ethical and compliant tax optimization.
- Navigate audits, disclosures, and tax risk management.
- Incorporate family governance into long-term wealth preservation.
- Align tax planning strategies with global financial and legal objectives.

Target Audience:

- Private Wealth Managers
- Tax Consultants and Advisors
- Accountants and Financial Planners
- Estate and Succession Planning Specialists
- Family Office Executives
- Investment and Legal Advisors
- Wealth Management Professionals
- High-Net-Worth Individuals and Entrepreneurs

Course Duration: 5 days

Course Modules:

Module 1: Overview of HNWI Taxation Principles

- Definition and global characteristics of HNWIs
- Tax residency and domicile implications
- Common personal tax risks and obligations
- Interaction between domestic and international tax laws
- Understanding wealth structuring fundamentals
- Case Study: Global comparison of HNWI tax frameworks

Module 2: Income and Capital Gains Tax Planning

- Taxation of earned and unearned income
- Capital gains management and timing strategies
- Deferral and reinvestment options
- Tax-efficient portfolio structuring
- Managing performance and carried interest
- Case Study: Capital gains planning for high-value portfolios

Module 3: Estate and Succession Planning

- Estate and inheritance tax principles
- Wealth transfer and gifting strategies
- Use of trusts, wills, and private foundations
- Family governance and generational planning
- International succession complexities
- Case Study: Structuring cross-border family estates

Module 4: International Taxation and Offshore Structures

- Offshore companies, trusts, and partnerships
- FATCA, CRS, and beneficial ownership rules
- Tax transparency and substance requirements
- Foreign tax credits and withholding tax reliefs

- Compliant offshore wealth structuring
- Case Study: Managing offshore assets for global families

Module 5: Residency, Mobility, and Citizenship Planning

- Tax residency rules and exit taxation
- Managing global relocation tax implications
- Investment-linked immigration programs
- Double taxation treaty optimization
- Strategic use of multiple residencies
- Case Study: Relocation and tax restructuring for mobile executives

Module 6: Taxation of Digital Assets and Alternative Investments

- Crypto and blockchain-based asset taxation
- NFTs, art, and luxury assets valuation
- Taxation of hedge funds and private equity
- Anti-money laundering (AML) compliance
- Emerging risks in digital wealth management
- Case Study: Tax treatment of cryptocurrency gains

Module 7: Philanthropy and Charitable Giving

- Structuring tax-efficient philanthropy
- Cross-border giving and donor-advised funds
- Social impact investments and blended finance
- Tax incentives and exemptions for charitable donations
- Integrating philanthropy into estate planning
- Case Study: Designing a family foundation for global giving

Module 8: Tax Risk Management and Compliance

- Managing audits, disputes, and disclosures
- Global anti-avoidance legislation and GAAR
- Ethics and governance in tax planning
- Risk assessment and reporting frameworks
- Best practices for tax transparency
- Case Study: Tax audit and voluntary disclosure strategies

Training Methodology:

- Instructor-Led Sessions: Delivered by experienced international tax and wealth planning professionals.
- Interactive Discussions: Encourages peer learning and exchange of best practices.
- Case Studies & Real-Life Scenarios: Demonstrates the application of tax strategies to real-world wealth management cases.
- Group Workshops: Facilitates collaborative problem-solving and decision-making exercises.
- Simulation Exercises: Provides hands-on experience in tax planning, structuring, and compliance.

• Assessment & Feedback: Enables participants to evaluate learning outcomes and strengthen practical understanding.

Register as a group from 3 participants for a Discount

Send us an email: info@datastatresearch.org or call +254724527104

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to DATASTAT CONSULTANCY LTD account, as indicated in the invoice so as to enable us prepare better for you.

Certification & Learning Methodology

- Hands-on practical delivery with real-world datasets, case studies, and lab exercises.
- Post-training mentorship, access to class resources, and customized follow-up support.
- Participants who successfully complete the course receive an accredited Datastat Certificate of Completion.

How to Enroll & Reserve Your Seat

1. Online Registration: Visit https://datastatresearch.org/courses/tax-planning-for-high-net-worth-individuals-training-course to register online.
2. Email Booking: Send participant details to training@datastatresearch.org for official invoice & reservation.
3. Support & Assistance: Inquire via phone +254 724 527 104 | +254 734 969 612.