

PROTECTING YOUR LEGACY:

GLOBAL MOBILITY & STRATEGIC WEALTH MANAGEMENT IN AN AGE OF DISRUPTION



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At a time of rapid change and ongoing uncertainty, putting money to work and protecting your financial legacy requires more than wealth. It demands foresight and smart decision-making. Although global headlines often focus on short-term shifts, astute investors know that long-term success lies in recognizing deep structural advantages and avoiding rash decisions.

This white paper discusses the intersection of global mobility and wealth preservation. It examines an important truth: although many nations compete for global money, the United States stands out for its enduring strengths rooted in independent institutions, the rule of law, and a dynamic economy that supports national and individual prosperity. These qualities persist, beyond the imposition of fleeting policies.

What Creates Lasting Power and Wealth?

Global wealth follows enduring principles. Those who preserve it over generations adapt to change, seize disruption, and rely on strong foundations.

The current global climate offers great opportunity but also risk that must be navigated. Short-term market shifts, amplified by instant access to news, can distract from persistent trends. A strategic approach to accumulating wealth focuses on long-term cycles, not headlines.

Lasting wealth is built and preserved in environments that protect ownership, enforce contracts and support fair markets. These are not just theoretical ideals—they are the pillars of economic resilience. Nations with strong property rights, dependable legal systems, and transparent financial infrastructure offer the most reliable ground for long-term investment. The United States continues to stand out in this regard, making it a leading destination for individuals and families seeking to protect and grow generational wealth.

The American Imperative: A Foundation of Unrivaled Strengths

Recent economic discussions center on short-term challenges, including the need to improve the US financial system. But a closer look reveals the strengths that sustain the United States as a top destination for accumulating wealth. Indeed, the very size and energy of the US economy demonstrate its historic ability to handle these challenging moments through its existing institutions and market rules. The focus for investors should be on the foundations that consistently support long-term prosperity in the United States, even through uncertain times.

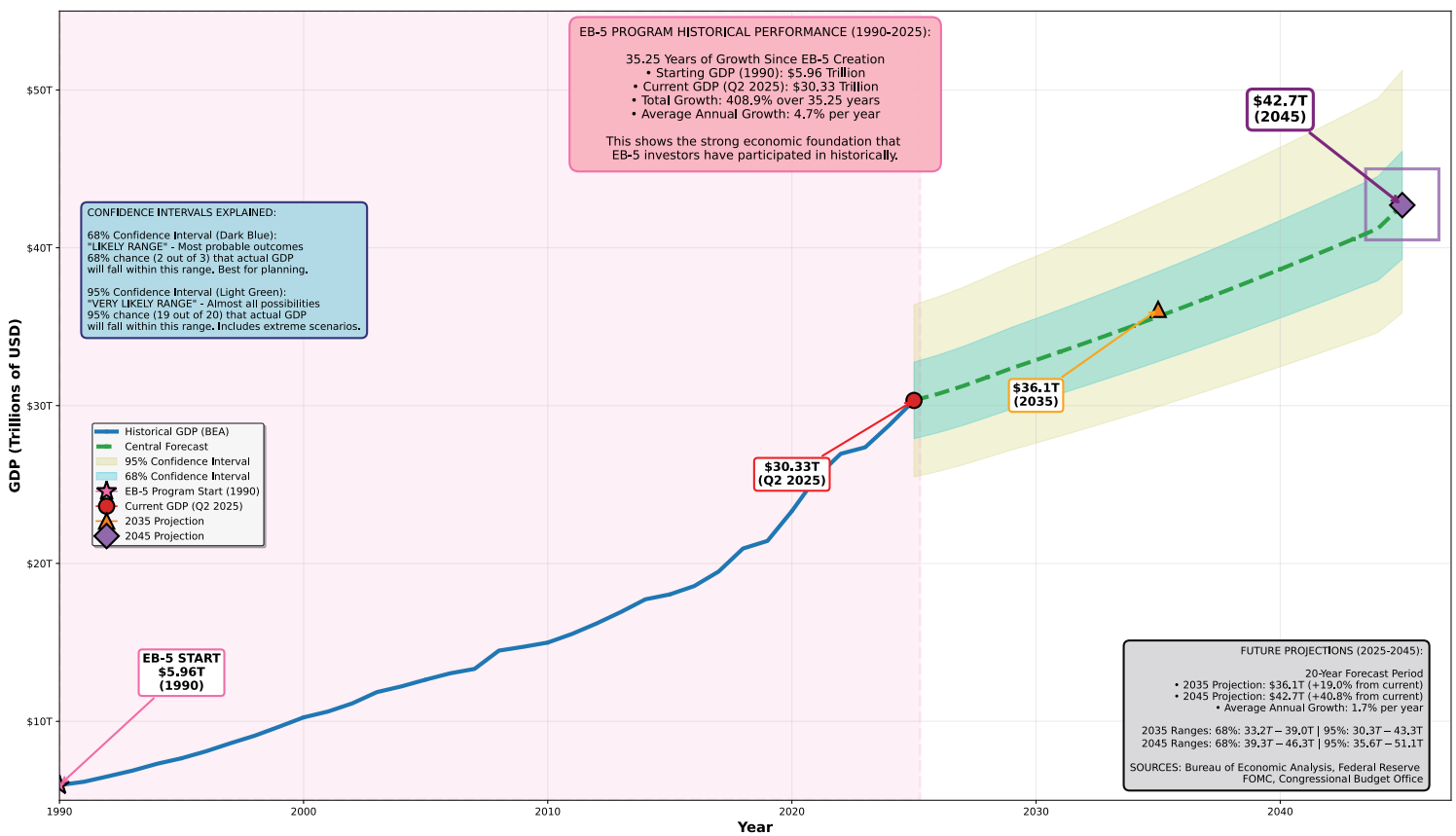


Scale and Scope: The Engines of Global Growth

The US economy—approaching \$30.331 trillion in Q2 2025, according to the Bureau of Economic Analysis—is defined not just by its size, but by its diversity and resilience. This scale protects the economy from regional shocks and supports opportunity across sectors in ways that smaller economies cannot.

According to the Congressional Budget Office, real GDP is projected to grow by 1.9% in 2025 and 1.8% annually through 2035, with inflation returning to the 2% target by 2027—a figure that should reinforce long-term confidence.

US GDP: 35 Years Since EB-5 Creation (1990-2025) + 20-Year Forecast (2025-2045)



This deep market enables wealth creation across industries, with US innovation going far beyond its tech giants in Silicon Valley. It's driven by regional strengths across the country—clean energy development in Texas, aerospace and defense in Florida and Alabama, life sciences in North Carolina and media and entertainment in California. In 2024 alone, the United States drew \$209 billion in venture capital— representing 56.8% of the \$368.3 billion in global investment —highlighting leadership in AI, biotech and renewable energy.

This constant influx of capital and talent fuels innovation, offering investors strong returns and access to transformative growth.

Capital Market Depth and Liquidity

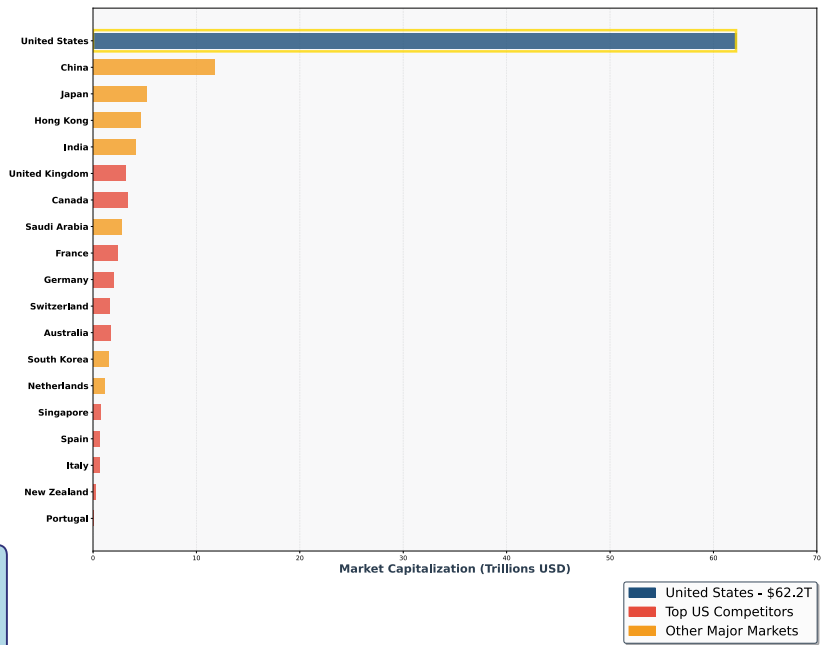
US capital markets are the deepest and most liquid in the world. By the end of 2024, the market capitalization of US publicly listed companies was \$62.2 trillion. These markets enable wealth holders to diversify, access capital, and exit positions efficiently.

Global Stock Market Capitalization: US vs Top Investment Migration Destinations Why America Dominates Capital Markets (2024 Latest Verified Data)

VERIFIED MARKET CAPITALIZATION:

US: \$62.186T (2024)
 China: \$11.756T (2024)
 Japan: \$5.131T (2024)
 Hong Kong: \$4.550T (2024)
 India: \$4.097T (2024)

TOP US COMPETITORS:
 UK: \$3.095T (2022)
 Canada: \$3.374T (2024)
 France: \$2.365T (2018)
 Germany: \$1.971T (2024)
 Switzerland: \$1.557T (2024)
 Australia: \$1.737T (2024)



EMERGING DESTINATIONS:

Singapore: \$0.754T (2024)
 Spain: \$0.650T (2023)
 Italy: \$0.637T (2024)
 Netherlands: \$1.100T (2017)
 South Korea: \$1.524T (2024)
 Saudi Arabia: \$2.727T (2024)

SMALLER COMPETITORS:
 New Zealand: \$0.204T (2024)
 Portugal: \$0.047T (2024)

Note: UAE and Monaco data not available in World Bank database

INVESTMENT MIGRATION SUMMARY:

VERIFIED COMPARISON (2024):
 • US Market Cap: \$62.186T
 • All Top US Competitors: \$16.4T
 • US Advantage: 3.8x LARGER

KEY INSIGHTS:
 • US = 47.8% of global stock markets
 • Unmatched capital market depth
 • Superior liquidity and transparency
 • Strongest investor protections worldwide

CONCLUSION:
 The US offers unparalleled capital market access that no other investment migration destination can match.

ALL DATA VERIFIED from World Bank
 Most recent figures available (2024)

KEY US CAPITAL MARKET ADVANTAGES:

- Market Size: \$62.186 Trillion (2024)
- Larger than next 4 countries COMBINED
- 5.3x larger than China (#2)
- 18.4x larger than Canada (top competitor)
- Unmatched Liquidity & Depth:
 - Deepest capital markets globally
 - Instant position entry/exit capability
 - 24/7 trading across multiple exchanges
- Superior Investor Protection:
 - Highest regulatory transparency
 - Strong rule of law and property rights
 - USD as global reserve currency
- Diversification Opportunities:
 - Broadest range of investment sectors
 - Access to global companies via US listings
 - Most sophisticated financial instruments

DATA SOURCES: World Bank (2024) • World Federation of Exchanges (2024)
 All figures verified from official sources • Data years: 2017-2024 (most recent available)

This depth is a critical safeguard, allowing investors to weather market swings and providing ways for them to sell investments that are often absent in less developed or more tightly controlled financial systems. Unlike in more restrictive markets, investors in the United States can shift strategies quickly, manage risk, and preserve capital. Few other jurisdictions offer this level of flexibility and transparency.

Fiscal Architecture and Wealth Preservation: A Strategic Framework

The US tax system, though complex, offers significant advantages when approached strategically. Investors can combine federal tax planning with benefits from states that do not impose an income tax. In 2025, the lifetime

federal estate and gift tax exemption rises to \$13.99 million per individual, enabling high-net-worth families to transfer substantial assets to heirs during their lifetime or at death without incurring federal estate or gift taxes. Compared with less predictable tax regimes, the United States provides a stable and transparent framework for preserving wealth across generations.

Cultural Mosaic and Social Mobility

The United States, shaped by diverse cultures, offers unique social vitality and a strong tradition of social mobility. Despite challenges, it welcomes families seeking better education, wealth preservation, and opportunities. As of 2024, 46% of Fortune 500 companies were founded by immigrants or their children, showing how the United States rewards individuals with talent and innovation regardless of their origin. For families seeking opportunity and legacy, the American Dream is a powerful promise.



World-Class Educational Institutions

Debates over higher education—such as funding and institutional autonomy—are natural in a robust democracy. Yet American universities continue to lead globally, offering unmatched academic freedom, deep endowments, and world-class research environments. In the 2025 QS World Rankings, MIT ranked #1, Harvard #4, and Stanford #6. The United States claims 10 of the top 25 institutions—more than any other country.

These universities are more than academic powerhouses. They serve as launchpads into global business, science, and public leadership. For globally minded families, access to elite US education remains a trusted, long-term asset—one that reinforces intergenerational mobility, strategic legacy planning, and enduring opportunity.

Family-Centric Environments and Lifestyle: A Holistic Approach to Prosperity

Beyond finances and academics, the United States offers diverse, family-friendly environments. From suburban areas with top-ranked public schools to cities with cultural, medical, and recreational assets, the country supports a high quality of life.

Families seeking both security and opportunity can choose from regions that reflect their values and lifestyle preferences, supported by robust infrastructure and community networks.

The Inversion Principle: Where Do Alternative Countries Fall Short?

Understanding the weaknesses of other jurisdictions sharpens perspective. Not all stable countries offer strong foundations for building long-term wealth. Here are examples where surface-level appeal can mask structural risk.



Dubai: Opportunities and Considerations

Dubai, the largest city in the United Arab Emirates (UAE) and a testament to audacious vision, has indeed attracted significant capital with its perceived safety and luxurious lifestyle. However, a deeper look reveals inherent vulnerabilities:

- **Economic concentration:** Its reliance on real estate, tourism, finance, and oil makes it susceptible to boom-and-bust cycles.
- **Geopolitical sensitivity:** Situated in a volatile region, Dubai is exposed to geopolitical risks that could swiftly disrupt stability and economic prospects.
- **Regulatory predictability (long-term):** While currently favorable, the regulatory environment in Dubai may lack the deep-rooted legal precedents and consistent application found in more established systems, potentially creating uncertainty for long-term wealth planning.

Switzerland: Evolving Wealth Management Landscape

Switzerland's formidable position in global wealth management is undeniable, given its oversight of trillions in assets. Yet even this bastion of stability faces emerging pressures:

- **Evolving global tax landscape:** Increasing international pressure on tax practices and banking secrecy, driven by global initiatives like the OECD's BEPS project, threatens Switzerland's role as a financial safe haven.
- **Economic vulnerability:** Switzerland's relatively small domestic market and export-oriented economy render it susceptible to global economic downturns and currency fluctuations.
- **Demographic shifts:** Like much of Europe, Switzerland has an aging population, putting pressure on its social welfare system and potentially leading to higher taxes. By 2050, the old-age dependency ratio is expected to reach 46.5%. Although high-net-worth individuals may not depend on state benefits, they remain affected as part of the overall tax base.
- **Regulatory burdens:** Increasing ESG (environmental, social, and governance) requirements could reduce flexibility for investors.

Europe: Stability and Growth Considerations

Europe offers a wonderful quality of life, deep cultural history, and stable, developed economies. For investors looking for growth, however, Europe's approach is slower and more bureaucratic.



- **Many layers of rules:** The regulatory landscape, with layers from both the EU and individual countries, can make things complex and slow.
- **Steady but slower growth:** Europe's major economies are very stable, but also mature, meaning they generally grow at a slow, measured pace. According to forecasts from the OECD and the European Commission, this steady, moderate growth is expected to continue, ideal for protecting existing wealth but offering fewer opportunities for high growth.
- **Aging population:** Europe's aging population has led to a large number of retirees being supported by fewer workers, putting pressure on government budgets. To pay for services like pensions and health care in the long run, future tax policies may need to change.
- **Many countries, many voices:** The EU's fragmented political structure often makes reaching quick, unified decisions difficult. For investors, this can create a less predictable environment than in a single country with a unified government and economic policy.



Canada: Economic Integration and Independence

Canada offers political stability, a high quality of life and abundant natural resources. Its advantages, however, are often overshadowed by its dependence on the United States, among other concerns:

- **Economic reliance on the US:** Canada's economic trajectory is inextricably linked to the policy decisions of its southern neighbor. In 2024, over 65% of Canadian exporters sold exclusively to the United States.
 - **Fiscal architecture:** While transparent, Canada's tax regime may prove less favorable for substantial wealth accumulation and preservation compared to more strategically positioned nations.
 - **Housing market instability:** Recent instability in Canada's key urban housing markets, characterized by inflated asset prices, presents a potential risk to overall economic stability and personal wealth.
- **Deep roots of the American-Canadian relationship:** The notion that Canada is moving definitively to distance itself from the US economy requires careful qualification. Although nations naturally seek to diversify trade relationships and assert economic independence, the deep ties between the American and Canadian economies are historical and structural and therefore not easily undone. Shared borders, supply chains, and decades of cross-border investment have created a strong economic interdependence. For strategic investors, the takeaway is clear: the United States remains the economic anchor of North America, and Canada's prosperity is closely connected to it.



Singapore: Efficiency and Market Access

Singapore boasts exceptional efficiency, a strategic global location and a stable political environment, making it a major financial hub. However, its strengths are accompanied by specific vulnerabilities:

- **Hyper-connectivity and external vulnerability:** Singapore's hyper-connected, export-oriented economy is acutely vulnerable to disruptions in global trade and geopolitical tensions. External demand significantly influences its growth, making it susceptible to global economic headwinds.
- **Exorbitant cost of living:** Singapore's exceptionally high cost of living—especially in real estate—can quietly erode capital over time. In 2024, private residential property prices rose 3.9%, extending an ongoing trend in one of the world's most expensive cities.

Navigating the Currents: Short-Term Dynamics and Long-Term Stability

How a country addresses short-term challenges often shapes its long-term economic trajectory. Although the United States faces its own complexities, its robust legal framework and historical resilience offer a clear advantage.

Addressing Contemporary Perceptions with Conviction

Concerns about shifting immigration policies, particularly those widely discussed in the news media, are understandable. However, even when policy adjustments affect the general immigration landscape, programs aimed at attracting high net-worth investors consistently retain strong bipartisan government support due to their direct contribution to job creation and economic growth in the United States.



The EB-5 Investor Visa Program, purpose-built for economic contributors, consistently receives bipartisan support for the economic value it returns to the country. As a result, high-net-worth investors are not subject to the same risks as other immigration categories. Key features of the EB-5 program include:

- **Minimum investment:** One-time, returnable investment of \$800,000 (in targeted employment areas) or \$1,050,000 in other areas, typically for a period of 3 to 5 years.
- **Job creation requirement:** 10 US jobs per investor.
- **High approval rates:** I-829 petition approvals exceed 95% based on USCIS data, while I-526E approval rates vary by project quality and preparation. Well-prepared applications with qualified projects typically achieve strong approval rates.



Investing in Enduring Cycles and Foundational Strengths

A strategic approach to wealth recognizes that market and geopolitical movements occur in predictable cycles. Even as markets rise and fall, structural advantages endure. The United States in particular remains well-positioned due to:

- a young and growing population compared to aging developed nations;
- its dynamic and resilient capital markets;
- its innovation ecosystems, from Silicon Valley to Austin; and
- its attractiveness to global talent, fueling economic renewal.

Wealth preservation means aligning with these advantages—not chasing short-term returns in fragile systems.



Mitigating Risk by Identifying Weaknesses

True risk mitigation isn't about eliminating all risk but identifying vulnerabilities and navigating them. By recognizing other nations' weaknesses—like narrow economies, instability, or aging populations—we see the strengths of the United States: economic diversification, global influence, and a self-renewing population through immigration. This resilience, built over centuries and supported by a strong legal system and rule of law, offers a key advantage for long-term wealth preservation.

Forging Your Strategic Path to the American Dream

The decision to strategically relocate one's wealth and potentially one's residency is multifaceted, demanding a careful balancing of financial considerations, regulatory landscapes, and personal objectives. If you are considering a move to the United States, here are initial practical steps:

- **Engage a specialist advisory team:** Consult with international tax advisors and cross-border wealth management experts for an initial assessment of your financial profile and how it aligns with US entry.
- **Explore immigration pathways prudently:** Work with an experienced immigration attorney to understand your options. Programs like the EB-5 Immigrant Investor Program (starting at \$800,000) offer a path to permanent residency. Approval rates remain high, especially for well-prepared investors in qualified projects.
- **Conduct a comprehensive global asset review:** Analyze your global asset structure to plan for efficient wealth transfer and management within the US system, ensuring smooth integration and long-term benefits.



Conclusion: A Legacy Forged in Stability and Opportunity

The current global economic and geopolitical landscape demands astute financial management and foresight. The United States, with its enduring economic dynamism, robust legal framework, profound cultural openness, and unparalleled educational opportunities offers a compelling and stable anchor for global wealth. Although short-term trends may present transient concerns, the long-term structural advantages of the American imperative remain undeniable. For those seeking to preserve, nurture, and secure their legacy, the path through the United States is not merely an option but a strategic necessity. It is a decision that resonates with the wisdom of centuries, offering not only prosperity but also a bedrock of stability in an ever-shifting world.

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