



# Protect your wealth

Choose Irish-Domiciled ETFs  
over US ETFs



## THE RISK

# US Estate Taxes Can Impact Your Heirs

Non-resident aliens (like Indian investors) have only a \$60,000 exemption

Above this, estate tax up to 40% on US-domiciled assets

Your heirs could lose a significant portion of your investments

## EXAMPLE SCENARIO

# Potential Tax Loss with US-Domiciled ETF (SPY)

Investment

\$200,000 in a S&P 500 index fund (SPY)

Taxable estate after exemption

\$140,000

Potential US estate tax

Up to \$56,000

REGULATORY

# No Relief from US-India Tax Treaty

The treaty does not exempt Indian investors from US estate taxes

The \$60,000 exemption is fixed—no increases or exceptions

## SOLUTION

# Switch to Irish-Domiciled ETFs

No US estate tax exposure

Assets governed by Indian inheritance laws

Example scenario with Irish domiciled ETFs:

US Estate Tax: \$0

Irish Estate Tax: \$0

SOLUTION

# Why Irish-Domiciled ETFs

Irish domiciled ETFs are exchange-traded funds (ETFs) registered in Ireland

Not subject to US estate taxes

Simplified estate planning for your heirs

Provide same market access to US stocks and indices

YOUR PARTNER IN GLOBAL INVESTING

## How Paasa helps

Give you access to Irish-domiciled ETFs mirroring US markets

Automated portfolio management and tax optimization

Seamless tax preparation—we provide the appropriate paperwork for your portfolio

Expert guidance tailored to your financial goals

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# Secure your investments with Paasa

Identify US-domiciled assets in your portfolio

Switch to Irish-domiciled ETFs



The background is a dark, textured surface featuring a complex pattern of wavy, concentric lines that create a sense of depth and movement. Overlaid on these lines is a fine, grid-like pattern of small dots, which varies in density across the image. The overall effect is a sophisticated, modern aesthetic. The text "THANK YOU" is centered in the middle of the image.

THANK YOU