Val de Vie Properties

GLOBAL ADVISORY

A SPECIALISED DIVISION OF VAL DE VIE PROPERTIES

Visas | Tax structuring | Exchange control | Investment vehicles | Estate Planning | Retirement

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CONTACT OUR TEAM ON WHATSAPP

ABOUT

Val de Vie Properties is dedicated to guiding buyers and sellers with precision throughout their property journey. Our property specialists combine years of experience with a proven track record in sales and rentals. By offering tailored guidance through our integrated, multidisciplinary Global Advisory team, we ensure clients secure exceptional properties in one of the world's most sought-after destinations, while delivering fully compliant and financially optimised solutions.

GLOBAL ADVISORY

This specialised division of Val de Vie Properties assists international buyers and sellers of South African property, including South Africans abroad reinvesting locally, as well as sophisticated investors seeking niche expertise in work and residency visas, exchange control, complex tax structuring, investment vehicles and international tax planning.

Val de Vie Properties guides buyers and sellers through the full property ownership journey, providing expert advice on all financial, tax and legal aspects.

Global Advisory Services

- PROPERTY SALES AND EXPERT CONSULTING
- TAX COMPLIANCE AND STRUCTURING
- DOUBLE TAXATION AND PROTECTION OF ASSETS
- VISA CATEGORIES AND APPLICATIONS
- ADVISING FOREIGN NATIONAL PROPERTY OWNERS
- ESTATE PLANNING
- CROSS-BORDER TRANSFERS AND EXCHANGE CONTROL
- ALL ONGOING LEGAL AND FINANCIAL COMPLIANCE
- NON-RESIDENT RETIREMENT AND REQUIREMENTS

THE ADVISORY TEAM

- PROPERTY SPECIALISTS
- EXPERIENCED ATTORNEYS
- TAX EXPERTS
- CHARTERED ACCOUNTANTS
- CERTIFIED FINANCIAL PLANNERS
- IMMIGRATION CONSULTANTS
- FOREX AND BANKING SPECIALISTS
- COMPANY SECRETARIAL ADVISORS

TAX COMPLIANCE & STRUCTURING

The most tax-efficient structure is determined by analysing benefits, risks and applicable tax rates. Additionally, preparation for the future sale of the property includes managing capital gains tax and withholding tax liabilities.

No single structure suits every foreign buyer. Each solution is shaped by the client's profile, purpose, and long-term goals. Our tailored approach ensures compliance, tax efficiency, and lasting value.

OWNERSHIP

INDIVIDUAL | COMPANY | TRUST

Foreign residents' tax number Compliance

IN-HOUSE MANAGED ADMINISTRATION

Our team handles all administrative requirements, including registering non-resident tax numbers as required by the South African Revenue Service (SARS) for non-resident property owners

LEGAL COMPLIANCE

Facilitating property transfers and legal registration, including establishing a formal record with SARS

PROPERTY MANAGEMENT

Receiving rental income, complying with tax obligations, and ensuring proper declaration and payment of taxes on such income

CAPITAL GAINS TAX

Capital Gains Tax (CGT) filings

WITHHOLDING TAX

Applications for reduced withholding tax on sale proceeds

REPATRIATION

Repatriating funds abroad through SARS and South African Reserve Bank (SARB) clearance

Double Taxation & Protection of Assets

Our team leverages Double Taxation Agreements (DTAs) to ensure foreign buyers are not subject to double taxation both in South Africa and their home country. Through proper treaty application, offshore income and assets can be excluded from the South African tax net.

We also provide formal tax residency opinions and advice on treaty tie-breaker rules to maintain foreign residency status where beneficial. This approach safeguards pensions, business income, capital gains, and estates from unintended South African tax exposure.

South Africa has one of the most extensive Double Taxation Agreement (DTA) networks globally, with 79 treaties in force, providing critical tax relief and cross-border protection for foreign investors.

OFFSHORE ASSETS | TAX RESIDENCY OPINIONS | TREATY APPLICATION | PREVENTING UNINTENDED TAX EXPOSURE

VISA TYPES & CATEGORIES

- Determining optimal visa and permit category fit for purpose without compromising tax residency status
- Visa requirements for short stay, long stay and permanent residence in South Africa
- Facilitate the different visa types: Critical Skills Work Visa, Remote Work Visa, Retired Person's Visa, Accompanying Spouse, Life Partner and Dependant Children's Visas (Relative's Visa), Study Visa, Permanent Residence Permit and Financially Independent Permanent Residence Permit
- Immigration applications fully prepared and facilitated by Global Advisory

ADVISING FOREIGN NATIONAL PROPERTY OWNERS

Assist non-resident property owners with leasing their South African property by:

APPOINTING A TAX REPRESENTATIVE
Crucial for navigating complex tax regulations effectively

USING A RING-FENCED FOREX ACCOUNT
Simplifies fund transfers and assists with correct tax reporting

DECLARING TAXABLE INCOME
Essential for accurate tax reporting despite complexity

PROPER RECORD-KEEPING
Fundamental for substantiating expenses with ease

ESTATE PLANNING

The Global Advisory multidisciplinary team of attorneys, tax practitioners and compliance specialists manage the end-to-end estate planning process in full compliance with South African law.

LOCAL WILL

Avoids intestate succession and ensures asset distribution according to the wishes of the testator

TRUST ESTABLISHMENT

Formalises tax planning and secures beneficial interests

ESTATE ADMINISTRATION

Facilitates effective management and distribution of assets

CROSS-BORDER TRUST STRUCTURING

For foreign nationals intending to relocate to South Africa, become tax resident, and protect offshore wealth, we offer a specialised, multi-jurisdictional structuring solution.

SHIELD OFFSHORE ASSETS
From South African estate duty and income tax

ENSURE TAX-EFFICIENCY
Across jurisdictions when it comes to income and capital flow

RETAIN CONTROL AND ACCESS
While complying with global tax obligations

ESTABLISH THE CORRECT FOUNDATION
For permanent residency and eventual immigration

IMPORTANCE OF EFFICIENT CROSS-BORDER FLOW

VITAL FOR COMPLIANCE
Record keeping, title deed endorsement, FICA compliance

SAFEGUARDING AGAINST NON-COMPLIANCE
Avoiding penalties, frozen transactions, inability to repatriate and tax liabilities

NON-RESIDENT BANK ACCOUNT
Assistance in property purchases and rental income

REPATRIATION
Source and purpose of funds, Balance of Payment (BOP) Code and Form

All structuring, legal, SARB requirements, and tax matters are handled by the Global Advisory team's attorneys, ensuring precision and global compliance.

ALL ONGOING LEGAL & FINANCIAL COMPLIANCE

LEVERAGING ENTITIES AND SPVs

Utilising South African corporate structures or Special Purpose Vehicles (SPVs) to protect assets, manage risks, optimise taxes and structure investments

STRUCTURE FORMATION AND OPERATION

Including complete accounting, CIPC registrations, VAT and transfer duty claims, independent reviews and statutory audits

SECTION 223 TAX OPINIONS

SARS TAX DIRECTIVES

SARS BINDING RULINGS

SETTING UP A NON-RESIDENT BANK ACCOUNT

Foreign buyers often face hurdles opening a South African bank account. Through a registered Financial Service Provider (FSP) and intermediary, remote opening of a non-resident bank account is possible.

RETIREMENT IN SOUTH AFRICA & TAX REQUIREMENTS

OUR SPECIALIST APPROACH

- Analyse risks and benefits
- Deliver formal residency opinions and treaty-based residency determinations
- Coordinate visa strategies
- Engage with SARS to ensure full tax compliance

STRUCTURING

- Manage offshore income and assets
- Engage with our experts for estate planning to align with local and foreign succession regimes
- Retain and protect capital and income across jurisdictions

With careful planning, retirement in South Africa can be both rewarding and tax-efficient, while protecting global income and assets for foreign nationals.

VAL DE VIE PROPERTIES

Take your first step towards

STRATEGIC PLANNING WITH GLOBAL ADVISORY

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