Advanced International Tax Planning and Governance Training Course

29 March – 2 April 2027
Lisbon

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Training Center

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Ref: 1147_184749 **Date:** 29 March – 2 April 2027 **Location:** Lisbon **Fees:** 5700 Euro

Overview

Advanced International Tax Planning and Governance Training Course is a one-week course for tax managers, finance leaders, international controllers and corporate tax professionals who leave with an International Tax Planning Framework. Participants structure commercial fact patterns, compare treaty and domestic-law consequences, and document cross-border decisions. The course addresses fragmented planning through scenario maps, review gates and escalation records. Agile Leaders Training Center develops international tax planning and governance capability.

Who Should Attend

- Teams responsible for international tax planning and governance
- Finance functions responsible for cross-border operating decisions
- Controllers responsible for entity and transaction fact patterns
- Tax functions responsible for treaty and withholding analysis
- Leaders responsible for tax risk review and escalation

The course assumes participants already interpret corporate tax data and cross-border transactions, and it leaves out introductory tax accounting and jurisdiction-specific legal advice.

Departments and Industries

The course supports departments and industries managing international tax planning across operating models and transactions.

- Corporate tax, finance, controllership and treasury
- Legal, compliance, strategy and business development
- Manufacturing, energy and consumer goods
- Technology, telecommunications and digital services
- Banking, insurance and professional services

Learning Objectives

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

- Analyze cross-border operating-model fact patterns
- Apply residence, source and treaty analysis pathways
- Evaluate permanent-establishment and withholding exposure
- Compare transfer-pricing and tax-planning interfaces
- Prioritize tax risks and escalation decisions
- Build an international tax planning framework

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Course Agenda

Day 1: Planning Facts and Governance

- Cross-Border Business Fact Pattern Canvas
- Entity and Transaction Relationship Map
- Commercial Purpose Evidence Checklist
- International Tax Risk Universe
- Planning Review and Approval Model

Day 2: Residence, Source and Treaty Analysis

- Residence and Source Question Matrix
- Applicable Treaty Selection Method
- Taxing Rights Allocation Worksheet
- Permanent Establishment Exposure Screen
- Treaty Position Evidence Record

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Day 3: Payments and Transfer Pricing Interfaces

- Cross-Border Payment Classification Tree
- Withholding Tax Decision Matrix
- Beneficial Ownership Evidence Checklist
- Arm's Length Principle Interface Map
- Transfer Pricing Documentation Alignment Test

Day 4: Scenario Comparison and Control

- International Tax Scenario Comparison Model
- Double Taxation Exposure Register
- Tax Assumption Validation Checklist
- Planning Risk Escalation Decision Tree
- International Tax Documentation Pack

Day 5: International Tax Planning Practice

- Exercise: Map a Cross-Border Operating Model
- Exercise: Test a Treaty and Permanent Establishment Position
- Exercise: Evaluate a Cross-Border Payment Chain
- Exercise: Compare and Escalate Tax Scenarios
- Capstone Exercise: International Tax Planning Framework

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Practical Exercises

The course uses suggested activities to convert cross-border facts into governed international tax planning decisions.

- Suggested activity: map entity and transaction facts for a manufacturing expansion
- Suggested activity: test treaty and permanent-establishment questions for a technology service model
- Suggested activity: compare payment and withholding scenarios for a financial group
- Suggested activity: present planning risks to a governance review panel

FAQs

Who suits international tax planning training?

Tax, finance, controllership and governance teams suit the training. Participants should already interpret corporate tax data and cross-border commercial transactions.

How does international tax planning differ from general corporate tax training?

International tax planning connects operating models with residence, source, treaty, permanent-establishment, withholding and transfer-pricing questions. General corporate tax training usually concentrates on one domestic tax system.

How should international tax planning scenarios be compared?

International tax planning scenarios should be compared through consistent commercial facts, domestic-law assumptions, treaty positions, payment flows, transfer-pricing interfaces, evidence requirements, risk ratings and approval conditions.

What evidence supports international tax planning decisions?

International tax planning decisions are supported by operating-model facts, contracts, activity records, entity relationships, payment classifications, treaty analysis, transfer-pricing documentation, assumptions, approvals and escalation records.

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What belongs in an international tax planning framework?

An international tax planning framework contains fact-pattern maps, analysis pathways, scenario comparisons, evidence standards, review gates, risk ownership, approval records and escalation criteria.

Conclusion

Participants take back an International Tax Planning Framework containing fact maps, treaty pathways, payment analysis, scenario controls and governance records. The framework changes isolated tax conclusions into traceable planning decisions. It helps tax, finance and business teams compare cross-border choices and escalate uncertainty.