



## Joe Fernandez

PRINCIPAL

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### OFFICE

655 N. Central Avenue  
Suite 810  
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### PRACTICE AREA & SPECIALIZATION

International Tax

### INDUSTRIES SERVED

High Net Worth  
Individuals and Family  
Offices

### CREDENTIALS AND CERTIFICATIONS

CPA, California

### EDUCATION

MST, Florida  
International University  
BS, Accounting, minor in  
Finance, Florida  
International University

### LANGUAGES

Spanish

Joe brings nearly 15 years of tax compliance and consulting experience to HCVT's international tax practice. He specializes in planning and reporting for high net worth individuals and closely-held businesses addressing domestic and foreign tax issues. His area of experience includes pre-immigration tax planning, expatriation planning, inbound corporate structures to minimize U.S. taxation, passive foreign investment companies (PFICs), controlled international corporations, Australian Superannuation, foreign trusts, and state income tax nexus. Joe has extensive experience in working with clients and their attorneys on participation in the federal offshore voluntary disclosure initiative program (OVDI). Additionally, he advises foreign individuals investing in U.S. real estate, foreign earned income exclusion, analysis of U.S. income tax treaties, foreign tax credits and Foreign Account Tax Compliance Act (FATCA).

Joe received his bachelor's in accounting, minor in finance, and a master's in taxation from Florida International University. He is a Certified Public Accountant in the State of California and a member of the ProVisors Global Group, American Institute of Certified Public Accountants and the California Society of Certified Public Accountants.

### Professional and Community Involvement

American Institute of Certified Public Accountants  
California Society of Certified Public Accountants  
ProVisors Global Group

### Tax Alerts

IRS Announces New Individual \$965 Compliance Campaign  
July 13, 2020

Foreign Trust Information Reporting – Filings, Penalties, and Relief

June 11, 2020