



# Welcome to Forvis Mazars **Corporate presentation**

June 2024



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# 01

Who we are



# Who we are

## Introducing Forvis Mazars

Forvis Mazars is a leading global professional services network. Uniquely formed of just two members, it is designed to be agile, to deliver consistency and with the global scale to meet clients' needs.

- Two members operating under a single brand - Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories, and Forvis Mazars LLP in the United States.
- Committed to providing an unmatched client experience, delivering audit & assurance, tax, advisory, and consulting services around the world.
- Our strategic mission is to move our clients, people, industry and communities forward.

[Learn more about us](#)





# Who we are

## At a glance

# Top 10

global network\*

# 100+

countries and territories

# 40,000+

combined professionals

# US\$5bn

combined revenue\*\*

# 400+

combined offices

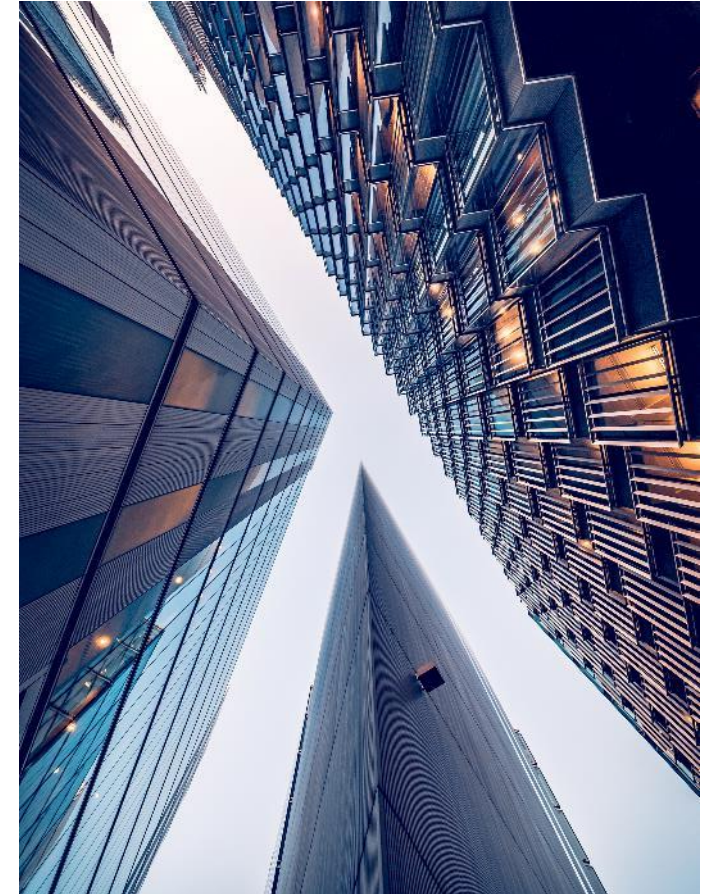
# 1,800+

combined partners

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.

\*Source: IAB World Network rankings 2023. Based on 2023 revenues for Mazars and FORVIS.

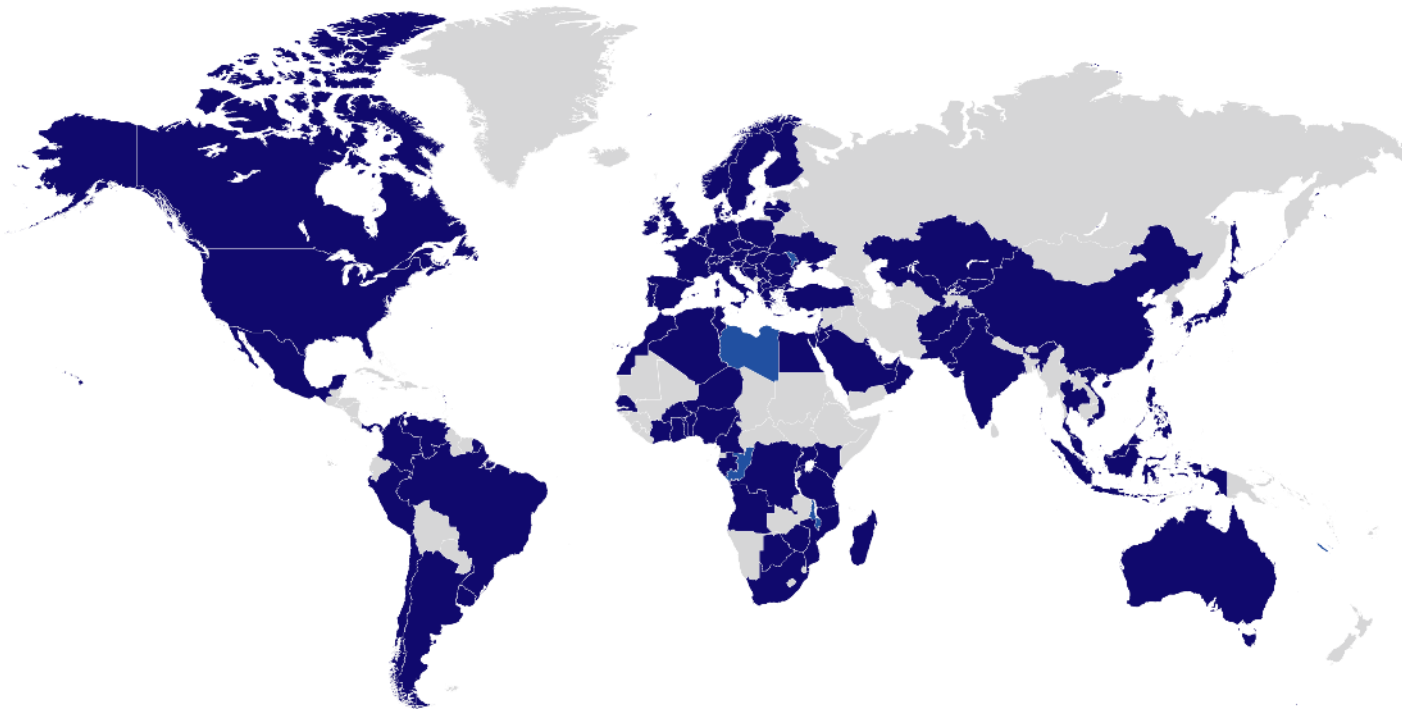
\*\*Mazars €2.8bn (\$3bn) at 31/8/2023 + FORVIS €1.6bn (\$1.7bn) at 31/5/2023



# Who we are

## Truly global geographic footprint

Forvis Mazars is a leading global professional services network. Our 40,000+ strong team is committed to delivering an unmatched client experience across the globe.



- Afghanistan
- Albania
- Algeria
- Angola
- Argentina
- Australia
- Austria
- Bahrain
- Belgium
- Benin
- Bermuda
- Bosnia and Herzegovina
- Botswana
- Brazil
- Bulgaria
- Burkina Faso
- Cameroon
- Canada
- Cayman Islands
- Chile
- China
- Colombia
- Congo
- Côte d'Ivoire
- Croatia
- Cyprus
- Czech Republic
- Democratic Republic of the Congo (DRC)
- Denmark
- Egypt
- Finland
- France
- Gabon
- Germany
- Ghana
- Greece
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Ivory Coast
- Japan
- Jordan
- Kazakhstan
- Kenya
- Korea
- Kosovo
- Kuwait
- Kyrgyzstan
- Latvia
- Lebanon
- Libya
- Lithuania
- Luxembourg
- Madagascar
- Malawi
- Malaysia
- Malta
- Mauritius
- Mexico
- Moldova
- Morocco
- Mozambique
- Netherlands
- New Caledonia
- Niger
- Nigeria
- North Macedonia
- Norway
- Oman
- Pakistan
- Palestine
- Panama
- Peru
- Philippines
- Poland
- Portugal
- Qatar
- Romania
- Rwanda
- Saudi Arabia
- Senegal
- Serbia
- Singapore
- Slovakia
- Slovenia
- South Africa
- Spain
- Sweden
- Switzerland
- Taiwan
- Tanzania
- Thailand
- Togo
- Tunisia
- Türkiye
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- Uruguay
- Uzbekistan
- Venezuela
- Vietnam
- Zimbabwe

As at 1 June 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars LLP in the United States and Forvis Mazars Group SC, an Internationally Integrated partnership operating in over 100 countries and territories.



# Who we are

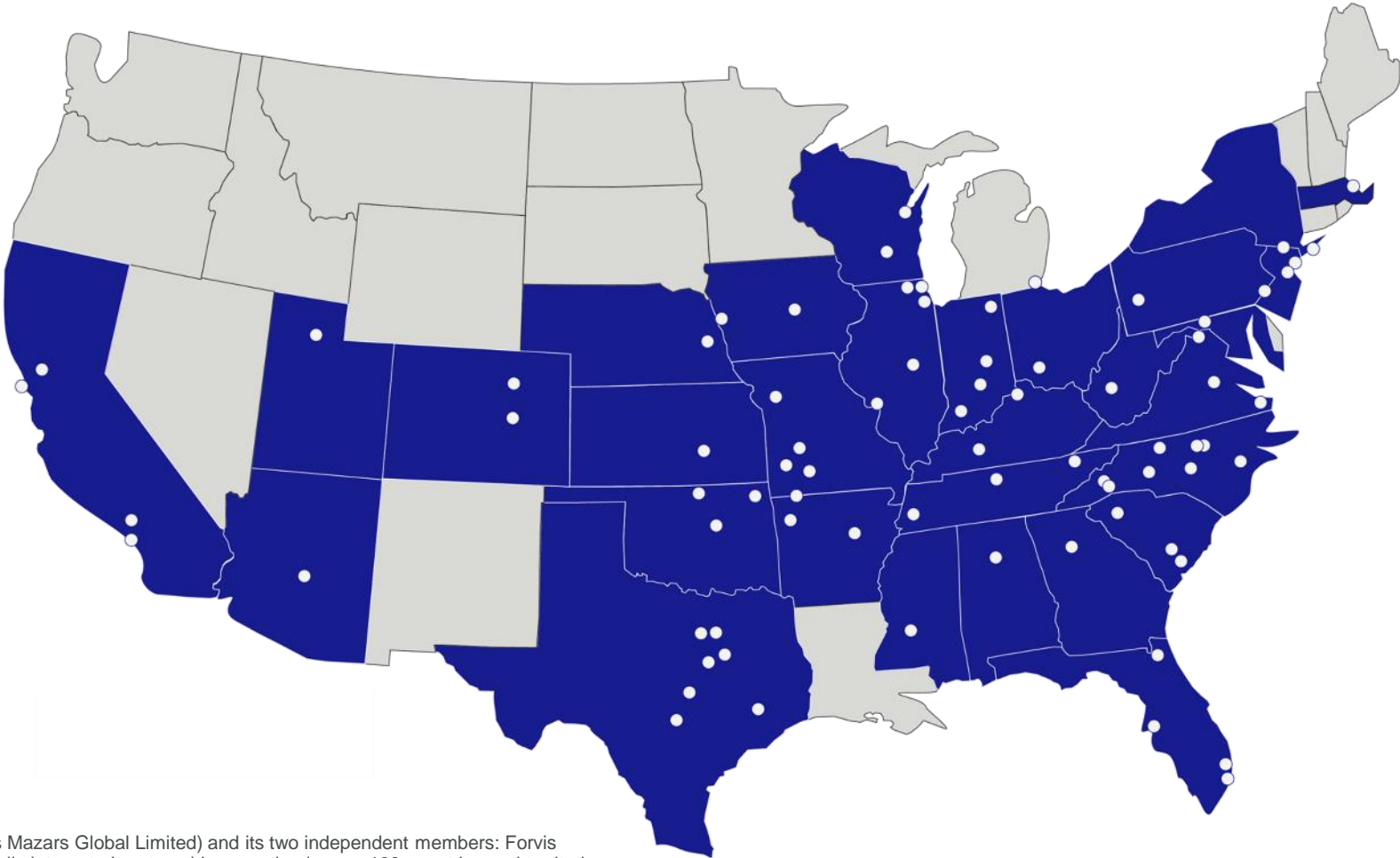
## Coast-to-coast coverage in the U.S.

**79**  
offices

**28**  
states

**600+**  
partners and principals

**7,000+**  
professionals



Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



# Who we are

## Serving our clients

Forvis Mazars is uniquely structured to be agile and nimble – allowing us to execute simply and quickly, to deliver comprehensive, consistent, high-quality services worldwide, tailored to your specific needs.

### Key benefits for our clients

- A **truly global** solution.
- Seamless access to **full-scale global coverage**, including a fully national U.S. presence.
- **Client service excellence**: a commitment to delivering an unmatched client service that is responsive, personal and tailored for each client.
- **Deep industry expertise**: experienced, proactive teams with superior knowledge and understanding, both globally and locally.





# Who we are

## Our brand identity

At our core is our commitment to providing a different perspective and an unrivalled client experience that feels right, personal, and natural.

### Providing clarity. Building confidence.

- Forvis Mazars is built to deliver robust, nuanced and individual answers for every client.
- Global to see the big picture and local to understand it.
- We provide advice that builds our clients' confidence and prepares them for what's next.



Consult the business presentations on our Group intranet for more slides on our services and industries.

# 02

Serving our clients



# Serving our clients

## An unmatched client experience

We operate around the world as a united team, with aligned interests, consistent delivery models and a shared commitment to the highest standards of service and ethics. We have the right scale and connectivity to serve your business effectively, wherever you are in the world, while remaining agile and personal in our approach.

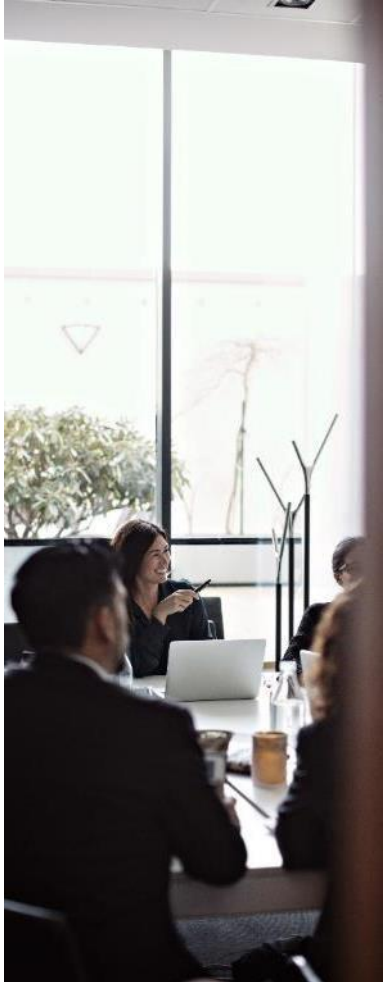
- Global solutions
- Seamless experience
- Consistent quality of service and professional standards
- Global and local expertise
- Agility in working together to tailor solutions to your needs
- Blend of sectoral, topical and geographical expertise
- Stable relationships through team continuity and single point of contact
- Consistent project methodologies and technical standards worldwide





# Serving our clients

## Experience across industries



### Consumer

- Consumer goods
- Food & beverage
- Hospitality & leisure
- Luxury
- Retail

### Private equity

### Energy, infrastructure & environment

- Infrastructure & capital projects
- Oil, gas & natural resources
- Power & utilities
- Renewable energy
- Water & waste

### Public & social sector

- Government
- Not for profit

### Financial services

- Asset management
- Banking & capital markets
- Insurance
- Real estate funds & investment management

### Real estate

- Constructors & developers
- Hospitality & leisure
- Property owners & users
- Real estate funds & investment management
- Social housing

### Life sciences & healthcare

- Life sciences
- Healthcare

### Technology, media & telecommunications

- Media
- Technology
- Telecommunications

### Manufacturing

- Aerospace & defence
- Agribusiness
- Automotive
- Chemicals & materials

### Transport & logistics

- Aviation
- Rail
- Shipping
- Trucking
- Logistics

# Serving our clients

## A balanced multidisciplinary offering

We operate as one team, taking a collaborative, integrated approach that allows us to deliver consistent and personalised services to clients of all shapes and sizes, across all sectors and geographies.

Whatever the issue, industry, size or stage of development, we bring expertise, agility and understanding to deliver the answers and experiences that are right for each client. We serve different types of businesses, including large and listed companies, privately-owned businesses, public and not-for-profit organisations, as well as private individuals.

Our multidisciplinary approach is key to supporting our clients' changing needs and helping them achieve sustainable growth. Audit has long been at the heart of our business, and we have developed robust tax, advisory, compliance and sustainability practices.

- Audit & assurance
- Consulting
- Financial advisory
- Legal
- Outsourcing
- Tax
- Sustainability

# Serving our clients

## Forward-looking insights

### Providing clarity and building confidence

Through our **blogs and publications**, we share our views on the future of industry sectors and our profession, discussing major changes that will impact the lives and businesses of our clients, and key trends that will reshape our societies.

We invest in **research and knowledge partnerships** to shape and advance the debate on key topics that matter for our economy and society, such as climate change, gender diversity and business sustainability.

And we engage **experts and thought leaders** in critical conversations on how these trends impact businesses.





# Serving our clients

## A range of tools and solutions that add real value

### Atlas

Our audit platform, designed to provide seamless and integrated group audits from anywhere in the world.

### InControl

Gives you complete oversight of your compliance activities in real time, enabling you to identify and resolve problems before they become an issue.

### Optimize

Helps you measure the efficiency and effectiveness of your business, through benchmarking, market maps, objective targeting and corporate analysis.

### Signals

Allows you to view all your documents and outstanding actions. With its clear timeline, you can see at a glance which tax returns you need to submit.

### PayWorld

A payroll management platform, powered by Payzaar, that simplifies, standardises and optimises payroll operations.



# 03

Building on strong foundations



# Building on strong foundations

## Values

Our values guide us in everything we do: how we work with our clients, how we empower our people and the role we play in our communities.

- Integrity
- Diversity and respect
- Independence
- Responsibility
- Technical excellence
- Stewardship





# Building on strong foundations

## Our corporate sustainability strategy

Driven by our core values, sustainability is at the centre of our growth strategy. Our strategic framework aims to foster positive and meaningful impact for our people, clients, the environment and local communities. It is rooted in five key pillars:

# #1

Upholding our values of integrity and responsibility

# #2

Putting people at the heart of our development

# #3

Reducing our environmental impact

# #4

Contributing to local communities

# #5

Supporting clients on their sustainability journey

# Building on strong foundations

## Education and culture

Our promise to our teams? Continuous training and progression, no matter your service line, geography or seniority.

- We offer a learning experience that is both digitally enabled and in-person, focusing on the full spectrum of skills needed to best prepare our participants for the leadership challenges they will face in the future.
- Through our programmes, we nurture critical thinkers and responsible leaders who will respond to our clients' expectations and needs. In 2023, our training programmes welcomed a record number of diverse participants from around the world.

# 20+

Our CLIP-accredited corporate university offers 20+ world-class leadership and business development programmes.

# 50+

Our recently developed Executive MBA welcomed 56 partners from 28 countries over five weeks.

Stats relate to Forvis Mazars Group SC, FY2022/2023



# Building on strong foundations

## Diversity and inclusion

We are by design a diverse and multicultural organisation. It is a strength we nurture.

- Diversity delivers greater value to our clients, attracts the best talent, and makes high-performing teams.
- We strive to go beyond diversity to create an inclusive and safe environment where all can excel by bringing their true selves to work every day.
- We are proud of the progress we have made, but we recognise there is still more to do, particularly in terms of gender balance, which we have made a strategic goal driven by our Group Executive Board.

# 53%

Women make up just over half of our workforce.

# 39%

Women account for under half of our governance bodies overall.

# 31%

A third of our leadership team are women.

Stats relate to Forvis Mazars Group SC, FY2022/2023





# Building on strong foundations

## Contributing to local communities

**€4.8m**

contributed through donations

**4,700+**

employees engaged through volunteering and pro bono initiatives across 51 countries

**32**

countries engaged in education-related community initiatives

**31,500+**

hours contributed through volunteering and pro bono initiatives

Stats relate to Forvis Mazars Group SC, FY2022/2023



# Building on strong foundations

## Reducing our environmental impact

With an ever-increasing urgency to combat climate change, we are fully dedicated to achieving net zero emissions.

Since joining the global Science Based Targets initiative (SBTi) in November 2022, we have taken decisive actions:

- We have calculated our global carbon footprint for a second consecutive year, establishing a solid baseline for progress.
- We have developed our near- and long-term emissions reduction targets, demonstrating our commitment to science-based decarbonisation.
- We are implementing a global net zero plan across all countries where we are present, outlining a clear roadmap to achieve our targets.
- We are developing tools and resources to help our people and suppliers assess and reduce their carbon footprint, empowering our people to take an active role in our net zero journey and paving the way for scope 3 decarbonisation.

Above information relates to Forvis Mazars Group SC





# Building on strong foundations

## Digitalising our firm and our services

We strive to embrace the potential of the latest technological breakthroughs to better serve our clients and enhance our teams' productivity.

### Growing network of tech hubs worldwide

- Our 10+ tech hubs around the world have the skills to capitalise on new technology and explore the opportunities it offers for our clients and teams.
- In 2023, we expanded our reach outside Europe and welcomed tech hubs in Mexico and South Africa.
- Across our services, we develop tools that offer greater data analytics capabilities, provide deeper insights and support more effective decision-making, while allowing our teams to work collaboratively and focus on higher added-value tasks.

# 10+

tech hubs

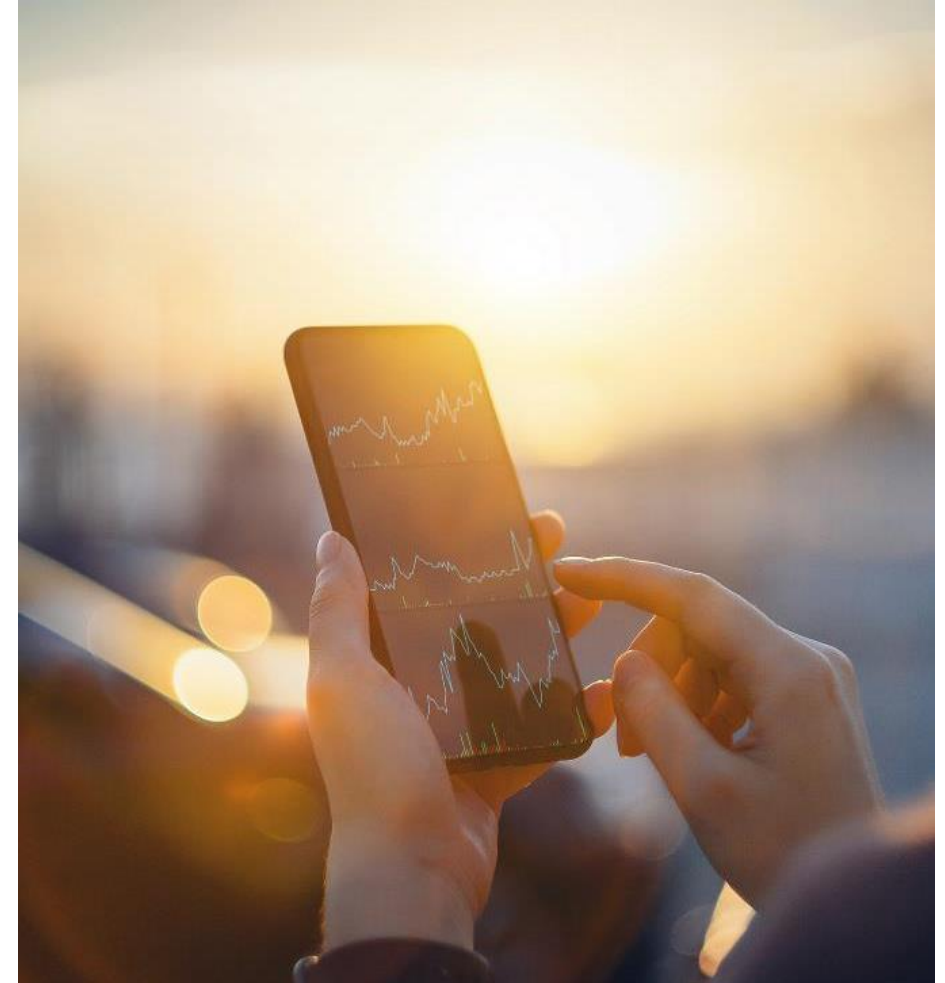
# 60+

countries and territories

# 300+

innovation ambassadors

Stats relate to Forvis Mazars Group SC, FY2022/2023





# Building on strong foundations

## The changing face of audit

It is a pivotal and exciting time for the audit profession. Forvis Mazars is playing its full part in addressing the developments reshaping the audit industry.

- Market expectations are shifting, regulatory requirements are expanding, technology is transforming the way audits are performed, and sustainability has become an imperative for companies as well as individuals, expanding the role of auditors and the scope of their mission.
- We believe the increasing demand for audit is positive recognition of the added value that auditors can bring in addressing economic and societal challenges.
- This is why our recommendations to policy makers are centred around building trust and quality in the audit market, and ensuring auditor independence remains the cornerstone of an evolving audit ecosystem.



# Building on strong foundations

## Shaping the future of our industry

We actively contribute to conversations on the future of audit to improve audit quality and to make sure audit regulations, standards and frameworks meet the evolving needs of the industry.

- We participate in these debates by sharing our views and responding to public consultations at national, regional and global levels.
- We contribute our knowledge and expertise to regulatory and public policy issues affecting auditing and corporate reporting around the world.
- Our recommendations to policy makers are centred around building trust and quality in the audit market, and ensuring the independence of auditors.
- We engage with key stakeholders and regulators through our involvement in professional organisations, working groups and institutions around the world:
  - Board membership of IFAC and IAASB, the international audit standard-setters.
  - Board membership and chair of working groups at Accountancy Europe and the European Group of International Accountancy Networks and Associations (EGIAN), professional organisations that represent auditor associations and accountants across Europe.
  - Participation in various working groups of national audit institutions around the world.





# 04

More about us





# More about us

## Forvis Mazars: a unique global network comprising two members

Forvis Mazars Group: an internationally integrated partnership operating in over 100 countries and territories

**€2.8bn**

fee income

(at 31 August 2023)

**100+**

countries and territories

**35,000+**

employees

**1,200+**

partners

Forvis Mazars LLP in the U.S.

**US\$2bn**

fee income

(at 1 June 2024)\*

**28**

states

**7,000+**

employees

**600+**

partners and principals

\*2023 revenues: FORVIS \$1.7bn at 31 May 2023, Mazars USA \$305M at 31 August 2023

# More about us

## Forvis Mazars Group at a glance\*

**€2.8bn**

fee income\*\*

**100+**

countries and territories

**35,000+**

professionals

**+13%**

growth in fee income\*\*\*

**300+**

offices

**1,200+**

partners

\*Figures valid for Forvis Mazars Group as at 1 January 2024 unless otherwise stated.

\*\* Financial year 1 September 2022 – 31 August 2023.

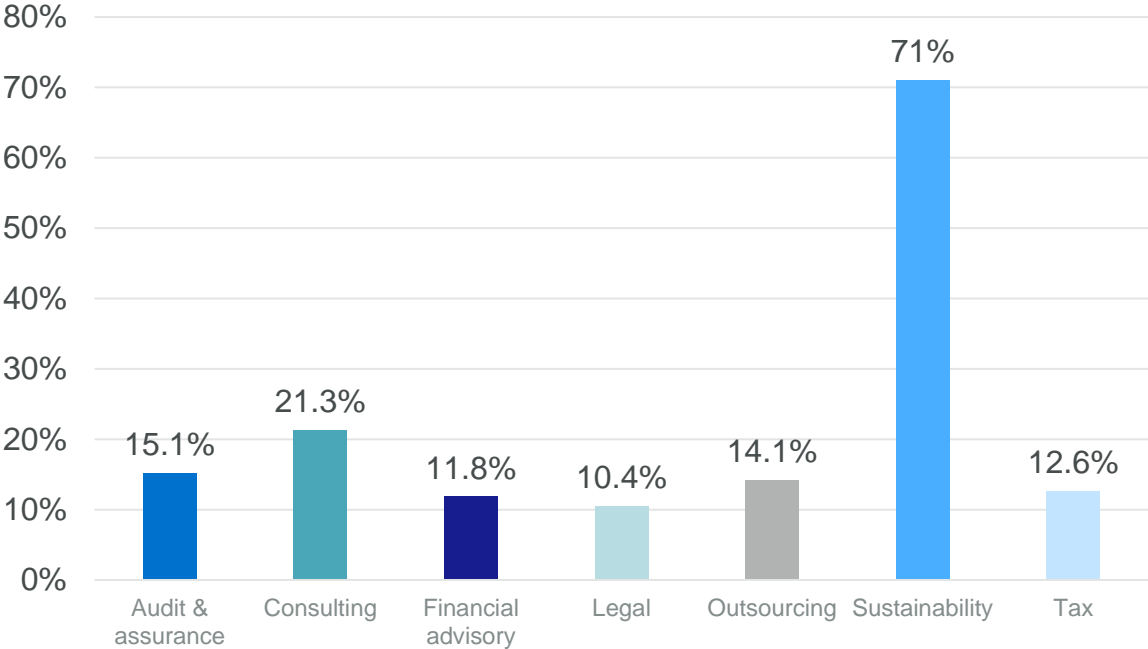
\*\*\* Versus 2021/2022 financial year, including forex impact.



# More about us

## Double-digit growth in 2022/2023

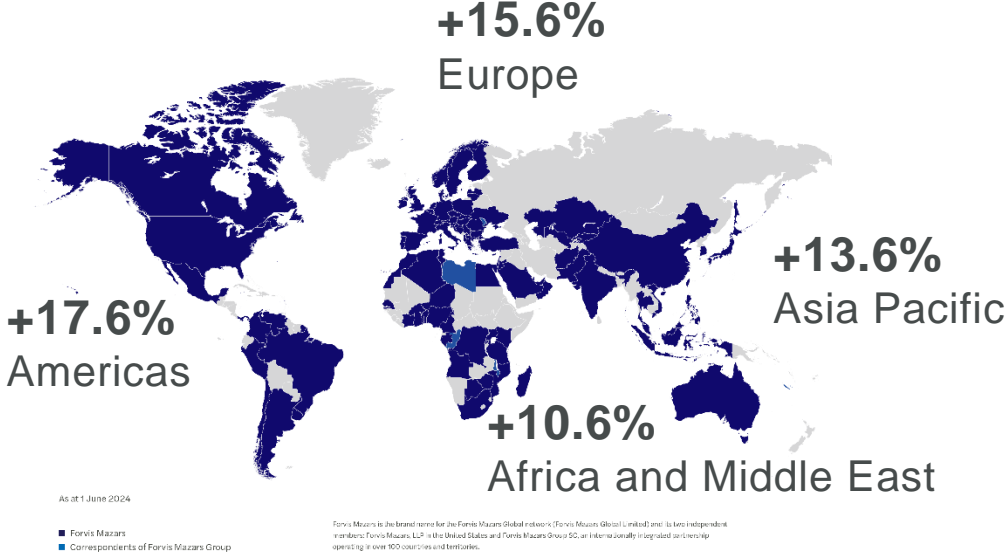
### Across all service lines...



Year-on-year growth rates for each of our service lines

Stats relate to Forvis Mazars Group SC, FY2022/2023

### ...and geographies

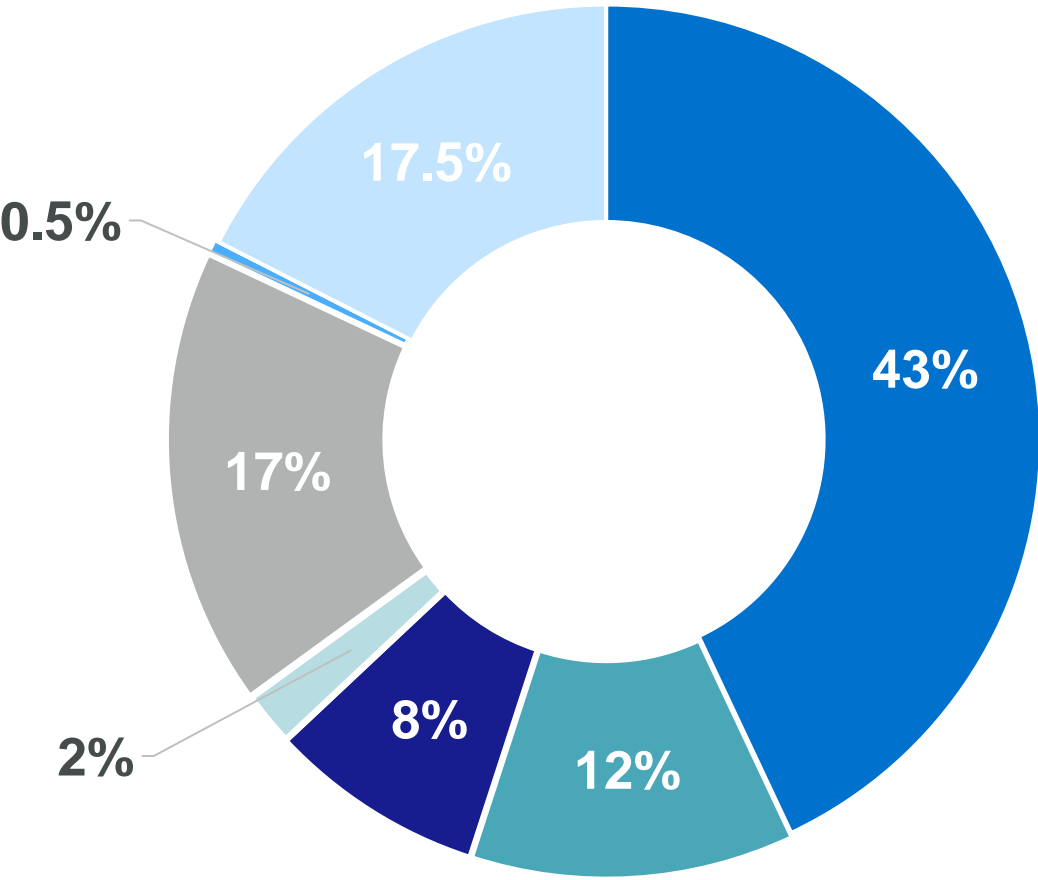


Year-on-year growth rates in our regions



# More about us

## Fee income contribution by service line\*



- Audit & assurance
- Consulting
- Financial advisory
- Legal
- Outsourcing
- Sustainability
- Tax

Stats relate to Forvis Mazars Group SC, FY2022/2023



# More about us

## Our growth journey

**1945**  
Foundation

Robert Mazars launches his namesake firm in Rouen, France.



**1995**  
International SME

International expansion and success lead to our unique partnership model; Mazars reaches €100m in revenue and approximately 1,000 professionals.



**2005**  
International mid-market business

Worldwide growth leads to:  
€500m revenue;  
5,000+ professionals;  
38 countries.



**2024**  
Expansion and growth

Mazars is now present in over 100 countries and territories and has revenue of €2.8bn.  
  
Clients have access to a team of 50,000+ professionals around the world: 33,000+ in the Mazars integrated partnership and an additional 17,000+ via the Mazars North America Alliance.



**1 June 2024**  
A new global network

Mazars and Forvis come together to create Forvis Mazars, a new global top 10 network designed to be agile, consistent and expand both firms' capabilities to serve diverse clients, especially those with international needs.

Information relate to Forvis Mazars Group SC, FY2022/2023

# More about us

## Forvis Mazars Group Executive Board

11 members from across the globe. As of 1 June 2024, the team comprises:



**Hervé Hélias**  
Chairman, France



**Pascal Jauffret**  
Switzerland



**Mark Kennedy**  
Ireland



**Rudi Lang**  
United Kingdom



**Julie Laulusa**  
China



**Olivier Lenel**  
France



**Taïbou M'Baye**  
Senegal



**Christoph Regierer**  
Germany



**Véronique Ryckaert**  
Belgium



**Ton Tuinier**  
Netherlands



**Phil Verity**  
United Kingdom



# More about us

## Forvis Mazars Group Governance Council

10 members from across the globe. As of 1 June 2024, the team comprises:



**Tim Hudson**  
Chairman of the GGC,  
United Kingdom



**Juliette Decoux**  
Vice Chair of the GGC,  
France



**Asa Andersson Eneberg**  
Sweden



**Gertrud R. Bergmann**  
Germany



**Maria Cabodevilla**  
Spain



**Fabrice Demarigny**  
France



**Chris Fuggle**  
United Kingdom



**Michelle Olckers**  
United Kingdom



**Frank Bournois**  
External member



**Denise Fletcher**  
External member

# More about us

## Forvis Mazars Global Network Board

10 members from across the globe. As of 1 June 2024, the team comprises:



Hervé Hélias  
Chairman



Matt Snow  
Vice Chair



David Chaudat



Pascal Jauffret



Rob Pruitt



Fran Randall



Véronique Ryckaert



Phil Verity



Tom Watson



Tim York

# 05

Forvis Mazars in Portugal





# Forvis Mazars in Portugal

## Our offices and services

Forvis Mazars is one of the leading audit, consulting and tax firms in Portugal with three offices and over 270 professionals.

### Lisboa



- 185+ professionals
- 6 CARL partners
- Service offering: Audit, Consulting, Financial advisory, Outsourcing, Sustainability e Tax

### Porto



- 70+ professionals
- 2 CARL partners
- Service offering: Audit, Outsourcing e Tax

### Leiria

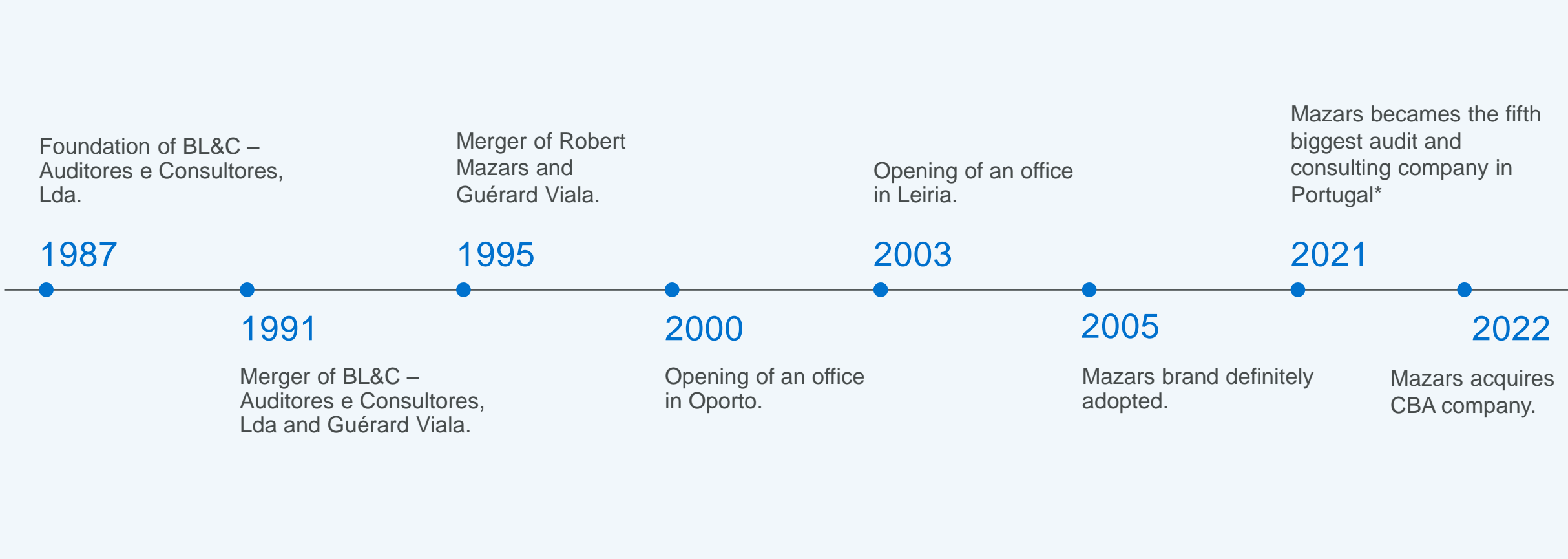


- 15+ professionals
- 2 local partners
- Service offering: Audit



# Forvis Mazars in Portugal

## Our history and growth



(\*) According to the annual transparency reports published by each auditor and consultant company pursuant to Article 23 of Law 148/2015 of September 9

# Forvis Mazars in Portugal

## Key indicators

**5th**

Fifth biggest audit and consulting company\*

**8**

International Partners

**€16.4M**

Fee income  
2022-2023

**+11%**

Annual Growth  
2022-2023

**270+**

Professionals

**3**

Offices

(\*) According to the annual transparency reports published by each auditor and consultant company pursuant to Article 23 of Law 148/2015 of September 9



# Experts you can trust

## Breadth & depth of expertise

### Audit & assurance - Financial services



Filipe Carvalho  
Partner



Pedro Jesus  
Partner

### Consulting



Pedro Mendes Silva  
Head of Consulting

### Outsourcing



Luís Batista  
Partner, Head of Outsourcing



Patrícia Cardoso  
Partner

### Audit & assurance - Industry & services



Luís Gaspar  
Country Managing Partner



José Rebouta  
Partner, Co-Head of  
Industry & services



Olivier Pilot Debiegne  
Partner

### Financial advisory



Celso Fernandes  
Director

### Sustainability



Maria João Vaz  
Head of Sustainability

### Tax



Sérgio Santos Pereira  
Partner, Head of Tax

# Our offering

## Audit & assurance

Independence and rigour that provides confidence and transparency for stakeholders and society.



**Luís Gaspar**  
Country Managing  
Partner  
lgaspar@mazars.pt  
+351 966 853 596



**José Rebouta**  
Partner  
Co-head of Audit I&S  
jrebouta@mazars.pt  
+351 963 067 586



**Olivier Pilot Debienne**  
Partner  
opilotdebienne@mazars.pt  
+351 927 803 664



**Filipe Carvalho**  
Partner  
fcarvalho@mazars.pt  
+351 935 860 541



**Pedro Jesus**  
Partner  
pjesus@mazars.pt  
+351 926 727 946

## Our approach

We offer a distinctive, human-centric approach that goes beyond compliance, with an integrated structure that allows us to work seamlessly as one team. We serve regional, national and international companies of all sizes and structures by combining the right people with the right skills for every engagement, leveraging our collective knowledge and using consistent tools and methodologies.

It is this robust approach that ensures a Forvis Mazars audit delivers full benefits both to a company, its shareholders and other stakeholders. It also ensures maximum benefit for society, contributing to the development of sustainable businesses and economies.

## How we can help

- **Financial audit**  
Enhancing management oversight and strengthening stakeholder relationships
- **Corporate reporting**  
Telling your story effectively and transparently to all your stakeholders
- **Independent assurance & reviews**  
Confident decision-making fuelled by reliable information and processes
- **Training services**  
Tailored technical training for your specific needs



# Our offering Consulting



**Pedro Mendes Silva**  
Head of Consulting  
pmsilva@mazars.pt  
+351 217 210 180

Transforming organisations by aligning people, processes and technology.

## Our approach

Companies thrive when their people, processes and tools are all aligned behind shared objectives. At Forvis Mazars, we help leaders across the business – from top management to finance, risk, IT and HR – to achieve alignment and deliver peak performance through collaboration, thoughtful advice and up-to-date technical and digital expertise.

We believe people are at the centre of successful change. As such, we combine our technical expertise, agility and the latest technology with a deep understanding of your needs, context and culture to co-create answers that drive the results you are looking for.

Our expert consultants work as one, integrated, international team. Combining our global expertise with deep local understanding, we can support you successfully from strategy to implementation in every market you operate in.

## How we can help

- **Management consulting**

Achieving outstanding results for your business

- **Risk consulting**

Tailored solutions for assurance and value creation in a changing world

- **Technology & digital consulting**

Amplifying your business with innovative solutions

# Our offering

## Financial advisory



**Luís Gaspar**  
Country Managing  
Partner  
lgaspar@mazars.pt  
+351 966 853 596



**Celso Fernandes**  
Director  
cfernandes@mazars.pt  
+351 935 860 221

Support for the critical moments that define the success of your business.

## Our approach

We understand every event is unique. The context, circumstances and people are different every time, and we believe we deliver the best service when we combine our technical expertise with a deep understanding of you and your situation. The scope of our services is broad and varied, but our approach is always the same:

We are relentlessly focused on helping you maximise value and achieve your objectives.

We take the time to understand your organisation to ensure a personal, pragmatic and productive approach.

We provide practical advice to help you make key business decisions with clarity and confidence.

As a uniquely integrated global partnership, we are able to mobilise teams of multi-disciplinary experts from across the globe in a seamless and efficient way to ensure you have the best team advising you regardless of where you, or your project, is based.

## How we can help

### Deals

Expert advice throughout the life cycle of the deal

### Financing

Secure the financing you need to achieve your goals

### Crisis & disputes

Expert support through your most challenging times

# Our offering

## Outsourcing



**Luís Batista**  
Partner  
Head of Outsourcing  
lbatista@mazars.pt  
+351 965 007 335



**Patrícia Cardoso**  
Partner  
Co-head of Outsourcing  
pcardoso@mazars.pt  
+351 963 515 549

An outsourcing partner that helps you play to your strengths.

## Our approach

For companies looking at opportunities in new geographic markets, outsourcing to Forvis Mazars is a low risk way to grow your business. It keeps your financial exposure to a minimum and enables you to draw on the specific skills and expertise you need, when you need them.

Our suite of tools and solutions will help you monitor and control your outsourced activities, wherever in the world you operate.

Mazars has a strong track record in helping businesses internationalise. Our outsourcing services are flexible and scalable, enabling you to react quickly to changes in your business or market.

## How we can help

### Accounting & reporting

Qualified specialists and integrated support to your accounting and finance team

### Corporate secretarial

Easing the burden on your business so you can focus on your core

### HR & payroll

Reliable, scalable and integrated solutions that reduce cost and improve efficiency

### Secondment services

Professional support for your internal teams when you need it most

### Tax compliance

Efficient handling of a growing workload

### Global compliance

An integrated team to help you navigate the complexities of global regulation

# Our offering

## Sustainability



**Maria João Vaz**  
Head of Sustainability  
mjvaz@mazars.pt  
+351 926 725 264

Helping companies place sustainability at the centre of their business.

### Our approach

Sustainability creates exciting opportunities for companies. It can improve corporate resilience, create economic value and contribute to a healthy ecosystem and strong community.

Depending on where your business is in its sustainability journey, we will assemble a team of area specialists that is focused on your unique needs and can offer solutions aligned with your goals.

Whether it's supply chain awareness, carbon mapping, climate change risk assessments or diversity promotion, we have the expertise and experience to deliver solutions that will support companies for the long-term. We believe our bespoke approach means you'll always have the right experts for the right project

### How we can help

#### **Your sustainability journey**

Whether you are at the beginning of your sustainability journey, or need support with your existing roadmap, we're here to help.

#### **Assessing and reporting your progress**

Building trust and demonstrating integrity whilst complying with evolving regulations.

#### **Implementing change**

Go further in your sustainability journey, tackle specific sustainability challenges, and dive into the operational aspects of your business transformation.



# Our offering Tax



**Sérgio Santos Pereira**  
Partner  
Head of Tax  
sspereira@mazars.pt  
+351 925 785 167

Insights and innovation to guide you through an ever-evolving tax landscape

## Our approach

Domestic and international legal and tax systems pose increased challenges for companies and individuals.

The complexities inherent in an intricate and ever-changing tax system require a solid, up-to-date and cross-cutting knowledge of the various areas.

Close collaboration allow us to create transparent and integrated solutions, simplifying the decision-making process for our clients.

## How we can help

- **Taxation of Family Business and Economic Groups**
- **Cross-sector structuring of investments**
- **Cross-border taxation (European and international)**
- **Mergers & Acquisitions and Tax Due Diligences**
- **Real Estate taxation**
- **Global mobility**
- **Private Clients and High Net-Worth Individuals**
- **Tax Benefits and Financial Incentives**
- **VAT and indirect taxes**
- **Transfer Pricing**
- **Compliance with reporting obligations**
- **Tax litigation**

# Forvis Mazars in Portugal

## Our Managing Team

The Managing team in Portugal is composed of 8 international partners:



**Luís Gaspar**  
Country Managing Partner



**José Rebouta**  
Partner, Audit & Assurance  
Co-Head of Industry & Services



**Luís Batista**  
Partner  
Head of Outsourcing



**Sérgio Santos Pereira**  
Partner  
Head of Tax



**Patrícia Cardoso**  
Partner



**Pedro Jesus**  
Partner, Audit & Assurance  
Financial Services



**Filipe Carvalho**  
Partner, Audit & Assurance  
Financial Services



**Olivier Pilot Debienne**  
Partner, Audit & Assurance  
Industry & Services

# Contact

## Forvis Mazars

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