



The Water's Edge is Dangerous: Planning Effectively for Foreign Clients with Domestic Ties

August 28, 2019
12:00 PM - 1:30 PM
JPMorgan Securities
2029 Century Park East, 37th Floor
Los Angeles, CA 90067

STEP Members: \$55
Non-STEP Members: \$75

Speakers:

Laura A. Zwicker, Partner
Greenberg Glusker Fields Claman & Machtinger LLP

Cindy D. Brittain, Partner
Katten Muchin Rosenman LLP

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TOPIC: The world has gotten small and clients are moving faster. As advisors, it is important that we understand not only the U.S. tax, probate and property law impacts of planning, but also how these planning techniques implicate the tax and property laws of the client's home jurisdiction. This presentation will examine how non-U.S. clients may acquire U.S. connections, whether assets or beneficiaries, examine the U.S. tax implications of various common planning structures and survey tax, reporting and legal implications of a variety of common U.S. planning structures in several key non-U.S. jurisdictions.

Questions and comments from the attendees are welcome and encouraged.

PARKING: VALIDATED (MEMBERS ONLY)

WHO SHOULD ATTEND: This presentation will be of particular Relevance to estate planners; tax lawyers; tax accountants; Lawyers representing family-owned businesses, entrepreneurs and other high-net-worth individuals; trust company officers; and in-house counsel and officers at trust companies and banks. We encourage all current STEP members and estate and trust professionals considering STEP membership to attend.

QUESTIONS: jennet.lisingperlas@withersworldwide.com

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