

STEP INTERNATIONAL TAX AND ESTATE PLANNING FORUM

Around The Globe in 2018

Thursday, May 3 & Friday, May 4, 2018

Presented by STEP Los Angeles

EARLY-BIRD RATES

Register by March 30, 2018 and pay \$795

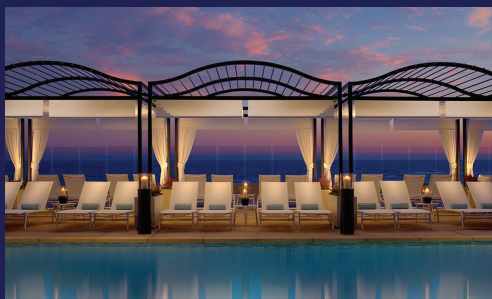
REGULAR RATES after March 30, 2018

\$895 STEP Members | \$995 Non-Members

Join us in Laguna Beach for another exciting experience where you will hear about the latest issues for international private client planning.

Presented by leading local and international speakers. Sessions will focus on key issues for your practice today. This conference includes broad ranging topics plus more focused topics from our specialist panels. There will also be networking opportunities, including breakfast and lunch on both days of the conference, as well as a welcome reception.

MCLE and CPE Continuing Education



AT THE SURF & SAND RESORT

Beautiful Oceanfront
Location
Laguna Beach, CA, USA



ADVISING FAMILIES ACROSS GENERATIONS

A special thank you to our
Headline Sponsor:



Topics Include

Planning for International
Families in the New World Order

Exchange of Information

Anti-Money Laundering for
Wealth Planners

Ethics In the Global Economy:
(U.S., U.K., and Switzerland)

Working with Treaties

Drafting Foreign Trusts with U.S.
Beneficiaries

U.S. Tax Cuts and Jobs Act: Impact
on Cross Border Planning

International Cross Border Aspect
of Retirement Planning

Private Trust Companies –
An Effective Planning Tool

Latest Developments in
the Art Market

Register at: www.regonline.com/step2018

STEP INTERNATIONAL TAX AND ESTATE PLANNING FORUM

Around The Globe in 2018 | Thursday, May 4 & Friday, May 5, 2018 | Presented by STEP – Los Angeles

SPECIAL THANKS TO OUR 2018 SPONSORS

HEADLINE SPONSOR



COCKTAIL RECEPTION SPONSOR



**Wealth
Management**

SPEAKER DINNER SPONSOR

Vontobel

Vontobel Swiss Wealth Advisors AG

NETWORKING BREAKS SPONSOR

LUNCH SPONSORS

withersworldwide
The law firm for success



EXHIBITOR SPONSORS



DELEGATE BAG SPONSOR

MEMORY STICK SPONSOR

LANYARD SPONSOR

KARLIN & PEEBLES, LLP
ATTORNEYS AT LAW

WIFI CO-SPONSORS



DAY ONE: THURSDAY, MAY 3

7:00 am **CONTINENTAL BREAKFAST AND REGISTRATION – EXHIBITS OPEN**

8:00 am **Pictet North America Advisors SA**
Special Presentation

8:45 am **Opening Remarks**

9:00 am **Panel 1 – Planning for International Families in the New World Order**
Simon Beck TEP, *New York, NY*

10:00 am **Panel 2 – Exchange of Information**
Chair: Mark Summers TEP, *Zurich, Switzerland*
Panelists: Marnin J. Michaels TEP, *Zurich, Switzerland*
Manuel Rajunov, *Dallas, TX and Mexico City, Mexico*

11:00 am **NETWORKING BREAK**

11:30 am **Panel 3 – Anti-Money Laundering for Wealth Planners**
Bruce Zagaris TEP, *Washington, D.C.*

12:30 pm **LUNCH**

2:00 pm **Panel 4 – Ethics In the Global Economy: Perspectives From the U.S., U.K., and Switzerland**
Chair: Carolyn A. Reers TEP, *New York, NY*
Panelists: Marnin J. Michaels TEP, *Zurich, Switzerland*
Mark Summers TEP, *Zurich, Switzerland*

3:00 pm **Panel 5 – Roundtable Discussions**
Co-Chairs: Ellen Kratzer TEP, *New York, NY*
Christopher Reimer TEP, *Jackson, WY*

4:00 pm **NETWORKING BREAK**

4:30 pm **Panel 6 –Working with Treaties**
Panelists: Michael Galligan TEP, *New York, NY*
Mark Summers TEP, *Zurich, Switzerland*

5:30 pm **RECEPTION**

8:00 pm **DINNER ON YOUR OWN IN LAGUNA BEACH**

Register online at: www.regonline.com/step2018

DAY TWO: FRIDAY, MAY 4

8:00 am **CONTINENTAL BREAKFAST AND REGISTRATION – EXHIBITS OPEN**

8:45 am **Opening Remarks**

9:00 am **Panel 7 – Drafting Foreign Trusts with U.S. Beneficiaries**

G. Warren Whitaker TEP, *New York, NY*

10:00 am **Panel 8 – U.S. Tax Cuts and Jobs Act; Impact on Cross Border Planning – U.S./Canada/Mexico/U.K.**

Chair: Alan W. Granwell TEP, *Washington, D.C.*

Panelists: Rachel L. Blumenfeld TEP, *Toronto, Canada*

Manuel Rajunov, *Dallas, TX and Mexico City, Mexico*

Mark Summers TEP, *Zurich, Switzerland*

11:00 am **NETWORKING BREAK**

11:30 am **Panel 9 – Private Trust Companies – An Effective Planning Tool**

Hélène Anne Lewis TEP, *British Virgin Islands*

12:30 pm **LUNCH**

1:45 pm **SPONSOR DRAWINGS**

2:00 pm **Panel 10 – Roundtable Discussions**

Co-Chairs: Ellen Kratzer TEP, *New York, NY*

Christopher Reimer TEP, *Jackson, WY*

3:00 pm **Panel 11 – International Cross Border Aspects of Retirement Planning – Canada/U.S.**

Panelists: Rachel L. Blumenfeld TEP, *Toronto, Canada*

Michael J. Jones, CPA, *Monterey, CA*

4:00 pm **NETWORKING BREAK**

4:30 pm **Panel 12 – Latest Developments in the Art Market: Issues and Red Flags for Collectors and Their Advisors**

Chair: Jean L. Tardy-Valleraud TEP, *Los Angeles, CA*

Panelists: Stephen W. Clark, *Los Angeles, CA*

Ronald D. Spencer, *New York, NY*

5:30 pm **CLOSING REMARKS**

DISTINGUISHED FACULTY

PROGRAM CO-CHAIRS

M. Katharine Davidson TEP

Henderson, Caverly & Pum LLP,
San Diego and Los Angeles, CA
STEP USA Chair

Lawrence H. Heller TEP

Greenberg Traurig, LLP, Los Angeles, CA
Past U.S. Council Representative for
STEP Worldwide

SPEAKERS

Simon Beck TEP

Baker & McKenzie LLP
New York, NY

Ellen Kratzer TEP

Fiduciary Trust Company International
New York, NY

Ronald D. Spencer

Carter Ledyard & Milburn LLP
New York, NY

Rachel L. Blumenfeld TEP

Aird & Berlis LLP
Toronto, Canada

Hélène Anne Lewis TEP

SimonetteLewis
British Virgin Islands

Mark Summers TEP

Charles Russell Speechlys
Zurich, Switzerland

Stephen W. Clark

The J. Paul Getty Trust
Los Angeles, CA

Marnin J. Michaels TEP

Baker & McKenzie LLP
Zurich, Switzerland

Jean L. Tardy-Vallernaud TEP

Gainsborough Capital, LLC
Los Angeles, CA

Michael W. Galligan TEP

Phillips Nizer LLP
New York, NY

Manuel Rajunov

Greenberg Traurig, LLP
Dallas, TX and Mexico City, Mexico

G. Warren Whitaker TEP

Day Pitney LLP
New York, NY

Alan W. Granwell TEP

Sharp Partners P.A.
Washington, DC

Carolyn A. Reers TEP

Norton Rose Fulbright US LLP
New York, NY

Bruce Zagaris TEP

Berliner Corcoran & Rowe
Washington, DC

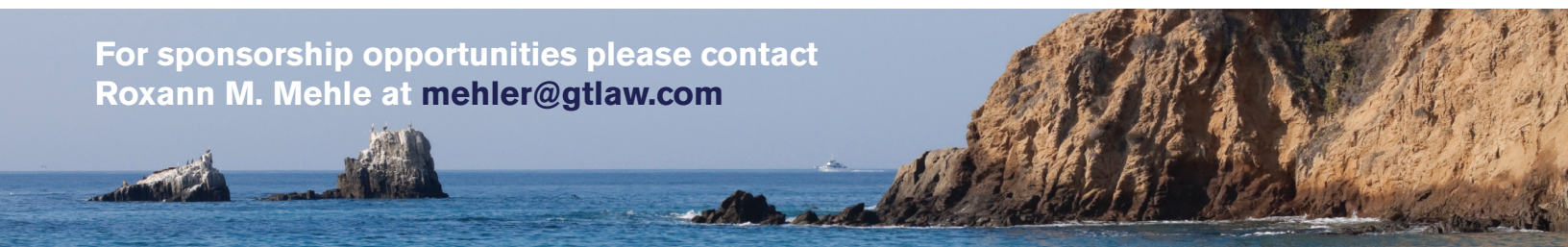
Michael J. Jones, CPA

Thompson Jones LLP
Monterey, CA

Christopher M. Reimer TEP

Long Reimer Winegar LLP
Jackson, WY

For sponsorship opportunities please contact
Roxann M. Mehle at mehler@gtlaw.com





STEP INTERNATIONAL TAX AND ESTATE PLANNING FORUM Around The Globe in 2018

Surf & Sand Resort | Laguna Beach, CA, USA – May 3 & 4, 2018

REGISTRATION FEES

Register online at: www.regonline.com/step2018

EARLY BIRD US\$795
(Register and Pay by March 30, 2018)

REGULAR RATE (After March 30, 2018)
STEP Members US\$895
Non-Members US\$995

CANCELLATIONS/SUBSTITUTIONS

Cancellations must be received in writing by April 16, 2018 and will be subject to an administration charge of \$200. It is regretted that cancellations made after that time will not be accepted and the delegate will be liable for the full conference fee. Substitutions may be made at any time provided the organizers are notified prior to the conference. Please contact mehler@gtlaw.com with any cancellations or substitutions.

TERMS AND CONDITIONS

STEP reserves the right to amend or cancel this course if the occasion necessitates. In such circumstances a full refund of any registration fee will be made but STEP shall accept no further liability. Prices may be subject to change. The delegate and firm are jointly and severally liable for payment of the fees due.

HOTEL ACCOMMODATIONS

Preferential rates have been negotiated at Surf & Sand Resort, Laguna Beach, CA, www.surfandsandresort.com. These are available on a first-come first-served basis. To book, please call (888) 579-8544. Please make reference to "STEP Conference".

Register online at: www.regonline.com/step2018

PROGRAM COMMITTEE

With special thanks to M. Katharine Davidson, of Henderson, Caverly & Pum LLP, and Lawrence H. Heller of Greenberg Traurig, LLP, for producing the STEP International Trust and Estate Planning Forum.

ABOUT THE ORGANIZERS

STEP is a unique professional body providing members with a local, national and international learning and business network for its members, who are professionals specializing in trusts and estates, executorship, administration and related taxes. For further information, visit www.step.org or email step@step.org

MEMBERSHIP INFORMATION

STEP USA:
usa@step.org

STEP Los Angeles:
Thomas H. Kenney
tkenney@ftci.com