



2010 International Wealth Planning Forum

For Professional Advisors

National boundaries do not contain our clients ... or their holdings. Advisors in Estate, Business, Tax and Wealth Planning are cordially invited to our annual International Wealth Planning Forum. Through collegiality and collaboration, we can provide the certainty and leadership our clients are seeking to offer them clarity and direction to their planning needs.

The format of the International Wealth Planning Forum is designed to engage the participants in an informal team-teaching setting, where dialogue and audience interaction is as important as what is communicated from the front of the room. The presenters are each experts in their field who enjoy teaching and who give of themselves and their time. Their unique skills, experience, expertise, and judgment are truly invaluable when blended with the incredible breath and depth of talents and experience of the attendees.

Keynote Speaker

Max Riederer von Paar, Esq.

Moderators

Joseph J. Strazzeri, Esq. and Lori Adasiewicz, Esq.

Date

Thursday, May 20, 2010, 3:00-5:00, Review & Refresh

Friday, May 21, 2010, 8:30 - 5:00, Main Event

Participation Fee

\$195

Program Location & Accommodations

Embassy Suites at San Francisco Airport - Burlingame

150 Anza Boulevard, Burlingame, California, USA 94010

Phone: 650.342.4600

Room Rate: \$119, *please call the hotel directly to make reservations*

To Attend

Please RSVP to Andrea Delgado at 650.525.0234 or

Email: rsvp@iwpforum.com

For more info, please visit <http://www.IWPForum.com>



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AGENDA

Thursday, May 20, 2010 - The Essentials

3:00 - 5:00 pm

The Essentials of International Tax Planning [Lori Adasiewicz, Esq. & Max Riederer von Paar, Esq.] What is ... “domicile” for transfer tax purposes; the effect of tax treaties; conflict of laws and how to address this in the planning process; how to identify assets that are subject to United States transfer tax and the rules for their taxation. Planning ideas for the non-citizen couple or client, including the Qualified Domestic Trust and alternatives; deductions and credits available to the international client; how to handle foreign beneficiaries; pre-immigration planning and traps for the unwary. How to choose a guardian for minor children when your closest relatives are overseas; choice of trustee; community property issues for international clients; conflict of laws and the use of situs wills.

Friday, May 21, 2010 - Advanced Studies

8:00-8:30

Registration & Continental Breakfast

8:30-9:00

A Brave New World [Joseph J. Strazzeri, Esq.] How has the world changed in serving the international and non-citizen client market? What are the challenges of planning under the new regime? Joe will provide tools and language to address what seems to be a new world order.

9:00-10:30

A Canadian in the Mix: Selected Planning Issues [Christine Perry, Barrister & Solicitor] What are the common issues encountered by U.S. planners who deal with Canadian clients living in the United States? The presentation will review basic planning considerations for Canadians considering emigration to the United States, estate planning concerns for Canadian citizens domiciled in the United States (including planning for Canadian assets), and receipt of cross-border inheritances and trust distributions.

10:30-10:45

Break

10:45-12:15

Advanced Topics in International Planning [Max Riederer von Paar, Esq.] Max will discuss a variety of advanced international planning strategies, including, but not limited to, international charitable planning, planning for foreign real estate investors, how to handle IRAs and foreign beneficiaries and the use of offshore trusts.

12:30-1:15

Lunch [David Holmes, MBA, CIO] How does an U.S.-based professional or corporate fiduciary meet the needs of International Clients and when are they required? How is the need for professional fiduciaries different for international clients and what are the options available to them?

1:15-2:15

Insurance Issues Faced by International Clients and their Businesses [Tom Befumo, MA, CLU] Clients coming in to the United States, or leaving to reside in another country, face a variety of insurance and risk management issues that may prevent or delay their achieving financial objectives; what can be done to prevent problems and create optimal benefit.

2:15-3:30

Income Tax Planning and Compliance for the Emigrating Client [Claudia Howe, CPA & Brent Bergan, CPA] Clients leaving the United States and those entering the country may be taxed differently on their income; how to determine “residency” for income tax purposes, what income is subject to tax, what deductions and credits are available; pre-emigration planning and traps for the unwary.

3:30-3:45

Break

3:45-4:45

Panel Discussion: Case Studies How do you put it all together? Our speakers will work collaboratively to facilitate a discussion of one or more client case studies (time permitting) to identify relevant issues and planning alternatives for handling them.

4:45-5:00

Closing Remarks [Joseph J. Strazzeri, Esq.]