

The 6th Annual STEP Pacific Rim Conference

Cross Border Estate, Income Tax, Business and Investment Planning for High Net Worth Individuals, their Families, Businesses and Trusts featuring speakers from more than six jurisdictions

Friday May 3rd &
Saturday May 4th, 2013
Intercontinental Los Angeles
Century City Hotel



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Society of Trust and
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Register by April 5, 2013 and pay only \$795
(members and non-members). Rates after April 5, 2013: \$895

MCLE and CPE continuing education pending.

Who Should Attend and why?

This two-day conference will be of particular relevance to estate planners; tax advisors; professionals representing family-owned businesses, entrepreneurs and other high net worth individuals; trust company officers; and in house counsel and compliance officers at trust companies and banks.

This conference will feature speakers from six foreign jurisdictions and four U.S. jurisdictions. Headline sessions will cover use of trusts to hold an international family business and conflicts between divorce decrees and trusts. Update sessions will cover international and FACTA withholding and reporting.

There will be estate planning workshops dealing with U.S.-Australia, U.S.-Hong Kong-China, Singapore-Hong Kong, U.S.-Japan, U.S.-Mexico, and U.S.-Canada.

SPECIAL PRE-CONFERENCE SEMINAR On Fundamentals of International Estate Planning

Thursday, May 2, 2013 (2 pm - 6:30 pm) Cost: \$150

Delegates who register for the 6th Annual STEP Pacific Rim Conference may purchase up to two tickets for the pre-conference for personal use or for other members of his/her firm. Please note that registration for the pre-conference seminar is separate from the Pacific Rim Conference. Contact mehler@gtlaw.com for registration and other details related to this pre-conference seminar.

Register online at: www.gtlaw.com/step2013



DAY ONE: FRIDAY, MAY 3, 2013 (8:30 A.M. TO 5:30 P.M.)

8:00 – 8:30 am

CONTINENTAL BREAKFAST

8:30 – 8:40 am

OPENING REMARKS:

William K. Norman, Conference Co-Chair and Chair of STEP Los Angeles

8:40 – 10:40 am

PANEL 1 - USE OF TRUSTS (OR OTHER VEHICLES) TO HOLD THE INTERNATIONAL FAMILY BUSINESS

Co-Chairs: William K. Norman, California; Christopher S. Armstrong, California

Panelists: Carla J. Rojas I., Panama

Mark Lea, Hong Kong

David Chong, Singapore

Nicholas Jacob, London

Christopher M. Reimer, Wyoming

10:40 – 11:00 am

BREAK

11:00 – 12:15 pm

PANEL 2 - INTERNATIONAL TAX ENFORCEMENT UPDATE

Chair: Paul A. Sczudlo, California

Panelists: Bruce Zagaris, D.C.

Brian Rowbotham, California

Abel F. Mejia Consenza, Mexico

12:15 – 1:15 pm

LUNCH

1:15 – 1:50 pm

AFTER-LUNCH SPEAKER: MATRIMONY AND TRUSTS IN CONFLICT

Nicholas Jacob, London

1:50 – 3:10 pm

PANEL 3 - DEALING WITH CONFLICTS BETWEEN DIVORCE DECREES (OR FORCED HEIRSHIP LAW) AND TRUSTS

Co-Chairs: Lawrence H. Heller, California; M. Katharine Davidson, California

Panelists: Stephen A. Kolodny, California

Mark Lea, Hong Kong

Carla J. Rojas I., Panama

Christopher M. Reimer, Wyoming

3:10 – 3:30 pm

BREAK

3:30 – 4:30 pm

CONCURRENT SESSIONS PART I:

PANEL 4 - CROSS BORDER PACIFIC RIM ESTATE PLANNING WORKSHOPS

PANEL 4A U.S. / AUSTRALIA

PANEL 4B U.S. / HONG KONG / CHINA

Chair: Paul A. Sczudlo, California

Chair: Brian Rowbotham, California

Panelists: Denise Honey, Australia

Panelist: Mark Lea, Hong Kong

Polina S. Chapiro, California

4:30 – 5:30 pm

**CONCURRENT SESSIONS PART II:
PANEL 4 - CROSS BORDER PACIFIC RIM ESTATE PLANNING WORKSHOPS**

PANEL 4C SINGAPORE / HONG KONG

Chair: William K. Norman, California
Panelists: Mark Lea, Hong Kong
David Chong, Singapore

PANEL 4D U.S. / JAPAN

Chair: Christopher S. Armstrong, California
Panelists: Akane R. Suzuki, Washington
Tomoko Nakada, Tokyo

5:40 – 7:00 pm

RECEPTION

DAY TWO: SATURDAY, MAY 4, 2013 (8:30 A.M. TO 1:30 P.M.)

8:00 – 8:30 am

BUFFET BREAKFAST

PANEL 5 - FATCA WITHHOLDING AND REPORTING UPDATE FROM VARIOUS PERSPECTIVES

Chairs: M. Katharine Davidson, California
Panelists: William K. Norman, California
Bruce Zagaris, D.C.
Abel F. Majia Cosenza, Mexico

10:00 – 11:00 am

**CONCURRENT SESSIONS PART III:
PANEL 6 - ESTATE PLANNING FOR INDIVIDUALS WITH FOREIGN SITUS ASSETS**

PANEL 6A U.S. / MEXICO

Panelists: Michelle B. Graham, California
Abel F. Majia Cosenza, Mexico

PANEL 6B U.S. / CANADA

Panelists: Lawrence H. Heller, California
Elaine E. Reynolds, British Columbia

11:00 – 11:20 am

BREAK

INTRODUCTIONS OF WEST COAST CHAIR & STEP FOUNDER AWARDS
Lawrence H. Heller, Chair of STEP USA

PANEL 7 - CASE STUDIES IN PLANNING FOR INDIVIDUALS CHANGING RESIDENCY AND/OR CITIZENSHIP

Chairs: Lawrence H. Heller, California
Panelists: Elaine E. Reynolds, British Columbia
Denise Honey, Australia
Akane R. Suzuki, Washington
Abel F. Majia Cosenza, Mexico

CLOSING REMARKS:

Lawrence H. Heller, Conference Co-Chair and Chair of STEP USA

PROGRAM CHAIRS

Lawrence H. Heller, TEP
Greenberg Traurig, LLP
Los Angeles, California
William K. Norman, TEP
Ord & Norman
Los Angeles, California

SPEAKERS/PANELISTS

Christopher S. Armstrong, TEP
Armstrong & Hastings, LLP
San Francisco, CA
Polina S. Chapiro, TEP
Green Hasson & Janks LLP
Los Angeles, CA
David Chong, TEP
Portcullis TrustNet (Singapore) Pte Ltd.
Singapore
M. Katharine Davidson, TEP
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Michelle B. Graham, TEP
McKenna Long & Aldridge LLP
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Pitcher Partners Advisors Proprietary Limited
Australia
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London
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Mark Lea
Lea & White
Hong Kong
Abel F. Mejia Cosenza, TEP
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Jackson, WY
Elaine E. Reynolds
Legacy Tax + Trust Lawyers
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Carla J. Rojas I
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The 6th Annual STEP Pacific Rim Conference

Cross Border Estate, Income Tax, Business and Investment Planning for High Net Worth Individuals, their Families, Businesses and Trusts featuring speakers from more than six jurisdictions

Extensive program of practical cross border topics on planning for international private clients and their global businesses offered at no other conference currently held on the West Coast.

Knowledgeable speakers from both West Coast and East Coast branches of STEP-USA and from several foreign country jurisdictions including Hong Kong, Singapore, United Kingdom, Mexico, Australia, Japan, Canada and Panama.

Varied presentation formats such as technical sessions, a panel on new

developments in international tax enforcement and practical case studies which includes examples dealing with both domestic and international issues.

Extensive background papers prepared by speakers and panelists available on a convenient CD. Most presentations are supported by PowerPoint slides.

Multiple question and answer sessions and opportunities to share and exchange ideas during breaks, luncheon, catered reception and continental and buffet breakfasts.



Society of Trust & Estate Practitioners
c/o Roxann Viehle
GreenbergTraurig LLP
1820 Century Park East, Suite 1900
Los Angeles, CA 90067

Register Online at www.regonline.com/step2013



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