

NYSBA **CLE**

The New York State Bar Association and The Society of Trust and Estate Practitioners USA (STEP) present:



12th Annual International Estate Planning Institute

Thursday & Friday, March 10-11, 2016

Crowne Plaza Times Square Manhattan Hotel, New York City

15 MCLE Credits:

This course also provides 15 CPE credits for NY and NJ CPAs

Chair: G. Warren Whitaker, Partner, Day Pitney LLP (New York, NY)

Vice Chairs: Stanley A. Barg, Partner, Kozusko Harris Duncan LLP (New York, NY)

Gideon Rothschild, Partner, Moses & Singer LLP (New York, NY)

Ellen Kratzer, Managing Director, Fiduciary Trust International (New York, NY)

Leigh-Alexandra Basha, Partner, McDermott Will & Emery LLP (Washington, DC)

Identifying and Solving Problems in the Taxation of NRAs

Leigh-Alexandra Basha, Partner, McDermott Will & Emery LLP (Washington, DC)

Shelly Meerovitch, Partner, Katten, Muchin, Rosenman LLP (New York, NY)

U.S. and Foreign Reporting to the IRS: FBAR, FATCA, Forms 8938, 3520, Etc.

Christopher J. Byrne, Principal, Christopher J. Byrne, PLLC (New York, NY)

Paul Hocking, Chairman, Frank Hirth (London, UK)

Foreign Trusts: Everything You Wanted to Know

Don Kozusko, Partner, Kozusko Harris Duncan LLP (Washington, DC)

Stanley A. Barg, Partner, Kozusko Harris Duncan LLP (New York, NY)

International Art Collecting

Keynote Speaker: Wendy Battleston, Senior Vice President, International Commercial Managing Director, Christie's Inc. (New York, NY)

Preimmigration Planning for a Move to the U.S.

Summer Ayers Lepree, Partner, Bilzin Zumberg LLP (Miami, FL)

Moderator: Leigh-Alexandra Basha

Issues in US/UK Estate and Tax Planning

Emma White, Solicitor, Forsters LLP (London, UK)

G. Warren Whitaker, Partner, Day Pitney LLP (New York, NY)

Current Developments in Planning for Latin American Clients

Sandra Viana, Partner, Withersworldwide (New York, NY)

Proposed Regulations on Gifts by Expatriates and Other New Developments

Stanley A. Barg, Partner, Kozusko Harris Duncan LLP (New York, NY)

Gideon Rothschild, Partner, Moses & Singer LLP (New York, NY)

The Non-Citizen Spouse Marital Deduction: Planning Tips and Traps

Zena M. Tamlar, Partner, Sullivan & Cromwell LLP (New York, NY)

Moderator: G. Warren Whitaker

Structuring for Cross-Border Investing Into and Out of the U.S.

Stephen Ziobrowski, Partner, Day Pitney LLP (Boston, MA)

Gavin F. Leckie, Managing Director, JP Morgan Private Bank (New York, NY)

Foundations and Stiftungen: Structure and U.S. Tax Treatment

Professor Dominique Jakob, University of Zurich (Zurich, Switzerland)

Comments from the U.S. Perspective

Michael W. Galligan, Partner, Phillips Nizer LLP (New York, NY)

Cross-Border Issues in Prenuptial Agreements and Enforcement of Divorce Judgments

Peter W. Bronstein, Partner, Bronstein Van Veen, LLC (New York, NY)

Brussels IV and European Union Succession Issues

Richard Frimston, Partner, Russell-Cooke Solicitors (London, UK)

Comments from the U.S. Perspective

Michael W. Galligan, Partner, Phillips Nizer LLP (New York, NY)

Recent Developments in Offshore Trust Litigation

Brian Simms, Senior Partner, Lennox Paton (Nassau, Bahamas)

Jurisdiction Update: Review of Regional Developments

UK: Emma White, Solicitor, Forsters LLP (London, UK)

France: Jean-Philippe Mabru, Managing Partner, Artales Avocats (Paris, France)

Israel: Meir Linzen, Partner, Herzog Fox & Neeman (Tel Aviv, Israel)

Who Should Attend: > Trust and Estate Attorneys > Tax Attorneys > Bank Attorneys > Trust Officers > Financial Planners > Accountants > Investment Advisors > Bankers > Estate Planners

Visit: www.nysba.org/cle or call 1-800-582-2452 to register.