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THE 4th ANNUAL STEP PACIFIC RIM CONFERENCE
MAY 12 & 13, 2011

SHUTTERS ON THE BEACH HOTEL, SANTA MONICA, CA

The 4th Annual STEP Pacific Rim Conference

Cross Border Estate Tax, Business and Investment Planning for High Net Worth Individuals, their Families and Businesses

WHO SHOULD ATTEND?

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 of trust companies and banks.

Early Bird – Preliminary Program

Register early and pay only \$795 (members and non-members)

This fee applies when you register and pay by April 4, 2011. Rates after April 4, 2011: \$895 (members and non-members)

Accredited for 11.75 hours of MCLE and CPA continuing education.

- Extensive program of practical cross border planning topics for international private clients and their global businesses offered at no other conference currently held on the West Coast.
- Speakers from both West Coast and East Coast branches of STEP USA and from ten other jurisdictions including Hong Kong, India, Canada, Mexico and United Kingdom.
- Practical techniques attendees need to develop effective estate and income tax plans for High Net Worth Clients with investment assets, residences, businesses and family members located in multiple jurisdictions.
- Varied presentation formats such as technical sessions, a panel on new developments in international tax enforcement, workshop on trust drafting, practical case studies which includes examples (and a role play) dealing with both domestic and international issues.
- A concurrent session on fundamentals of taxation of foreign trusts and their beneficiaries.
- Extensive background papers and form clauses prepared by speakers and panelists available on a convenient CD.
- Practical panels analyzing typical two-country planning scenarios (e.g., United States-Mexico, United States-Canada, United States-India, and United States-China, including Hong Kong and Taiwan).
- Multiple question and answer sessions, as well as opportunities to exchange ideas during the breaks, the luncheon, the catered reception and the buffet breakfast.
- Ample opportunity to meet and network with presenters and attendees from all three North American jurisdictions, including three Latin America jurisdictions, Hong Kong, India, United Kingdom, and three offshore financial centers.

This conference is co-sponsored by STEP's Los Angeles, San Francisco, San Diego and Seattle branches

Accommodations. STEP has reserved a block of rooms at Shutters on the Beach Hotel, Santa Monica allocated on a first-come basis. Attendees may reserve directly with the hotel (800) 334-9000. Please make reference to STEP Pacific Rim Conference.

For Membership Information

STEP USA - contact Jeryl Pine at jeryl.pine@step.org

Los Angeles - contact Paul Sczudlo at paul@sczudlolegal.com

San Francisco - contact Kent Lawson at klawson@bprmlp.com

San Diego - contact Michelle Graham at mgraham@luce.com

Seattle - contact Dorothy Foster at dfoster@fosterlawgroup.com



The 4th Annual STEP Pacific Rim Conference

Cross Border Estate Tax, Business and Investment Planning for High Net Worth Individuals, their Families and Businesses

CONFERENCE PROGRAM

Program Committee

With special thanks to **Lawrence H. Heller** of Greenberg Traurig, LLP, **William K. Norman** of Ord and Norman, and **Kent Lawson** of Burr, Pilger & Mayer for producing the 2011 Pacific Rim Conference.

About the Organizers

The Society of Trust and Estate Practitioners (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, executorships, administration and related taxes. STEP has nearly 15,800 members worldwide, providing coverage of over 60 jurisdictions. For further information, visit www.step.org or email step@step.org

	May 12, 2011	DAY 1 - Thursday	
	8:00–8:30 am	Continental Breakfast	
	8:30–8:40 am	Welcome and Introduction by Conference Chairs	
	8:40–10:10 am	Plenary Session: Panel 1	
		International Tax Enforcement in Era of Transparency: A Technical Update for Practitioners and Institutional Service Providers Panel of Practitioners in the Enforcement Trenches: Chair: William Norman Panelists: Bruce Zagaris and Kevin Packman	
	10:10–10:30 am	Break	
	10:30–11:20 am	Concurrent Sessions:	
		Panel 2A	Panel 2B
		Fundamentals of United States Taxation of Foreign Trusts, Grantors and Beneficiaries Panel of United States Tax Practitioners: Co-Panelists: Kent Lawson, Katharine Davidson, and Michael J. Karlin	Advanced Planning for United States Beneficiaries of Foreign Trust: Technical Session by a Panel of United States Tax Practitioners: Co-Panelists: Paul Sczudlo and Dina Kapur Sanna
	11:25 – 12:30 pm	Plenary Session: Panel 3	
		Advising Nonresident Aliens Intending to Acquire a Substantial Personal Residence and Valuable Personal Property in the United States: Analysis of Case Examples by a Panel of United States Practitioners: Chair: Katharine Davidson Panelists: Dorothy Foster and Stanley Barg	
	12:35 – 1:20 pm	Lunch with Speaker: Geoffrey Shindler	
	1:30 – 2:40 pm	Plenary Session: Panel 4	
		Domestication and Expatriation of a Trust: Change of Governing Law and Forum of Administrations: <i>Hands-On Workshop led by Experienced Practitioners from Several Jurisdictions:</i> Co-Chairs: Christopher Armstrong and Nigel Porteous Panelist: Christopher Reimer	
	2:45 – 3:45 pm	Concurrent Sessions:	
		Panel 5A	Panel 5B
		United States/Canada/United Kingdom Cross Border Estate and Family Business Planning Panel of United States, United Kingdom and Canadian Practitioners: Co-Panelists: Ian Worland, Stephanie Hathaway, and Christopher Lintott	United States/Mexico Cross Border Estate and Family Business Planning Panel of United States and Mexican Practitioners: Chair: Paul Sczudlo Panelists: Francisco Cervantes and Maurico Bravo Fortoul
	3:45 – 4:00 pm	Break	
	4:00 – 5:40 pm	Plenary Session: Panel 6	
		Multijurisdictional Trust Drafting: A Practicum -- Workshop Conducted by Experienced Practitioners from Several Jurisdictions: Co-Chairs: Michelle Graham and Nigel Porteous Panelists: Charlotte Ito and Gideon Rothschild	
	5:40 pm	Cocktail Party	
		DINNER ON YOUR OWN IN SANTA MONICA	

CONFERENCE PROGRAM

May 13, 2011	DAY 2 - Friday	
8:00 - 8:30 am	Buffet Breakfast	
8:30 – 8:35 am	Brief Comments from Chairs of Step West Coast Chapters	
8:35 – 9:30 am	Plenary Session: Panel 7	
	Asset Protection Practice in the United States: Current Best Practices, and Predictions for the Future <i>Practical Commentary from Panel of Experienced Practitioners from Several Jurisdictions:</i> Co-Chairs: Gideon Rothschild and William K. Norman Panelists: Christopher Reimer and David McNair	
9:30 – 10:40 am	Plenary Session: Panel 8	
	United States/India Cross Border Planning <i>Analysis of A Comprehensive Case Study by Multinational Panel:</i> Chair: Dina Sanna Kapour Panelists: Bijal Ajinkya and Assad Abdullatiff	
10:40 – 10:55 am	Break	
10:55 – 12:25 p.m.	Concurrent Session:	
	Panel 9A	Panel 9B
	United States/Latin America: Estate and Family Business Planning <i>Analysis of Case Examples by United States and Latin American Practitioners:</i> Chair: Lawrence Heller Panelists: Leonardo Braune , and Michael Grasty	Planning for Individuals and Their Businesses Into and From Greater China: PRC, Hong Kong and Taiwan <i>Analysis of Case Examples by Panel of Practitioners:</i> Chair: William K. Norman Panelists: Silvia On , Deborah W.S. Lee and Brian Rowbotham
12:30 – 1:10 pm	Plenary Session: Panel 10	
	Planning for Individuals Moving from One Jurisdiction to Another: Family Business, Marital Property, Succession, and Related Tax Issues for the Peripatetic Individual <i>A Role Play:</i> Co-Chairs: Lawrence H. Heller and Christopher Lintott Panelists: Leonardo Braune and Michael Grasty Role Player: Barbara Zak	
1:10 – 1:15 pm	Closing Comments by Conference Chairs	

PROGRAM CHAIRS

Lawrence H. Heller, TEP
Greenberg Traurig, LLP
Santa Monica, CA

William K. Norman, TEP
Ord & Norman
Los Angeles, CA

Kent Lawson, TEP
Burr, Pilger & Mayer
San Francisco, CA

SPEAKERS/PANELISTS

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Axis Fiduciary Ltd
Port Louis, Mauritius

Bijal Ajinkya
Nishith Desai Associates
Mumbai, India

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Legacy Tax + Trust Lawyers
Vancouver, Canada

Bruce Zagaris, TEP
Berliner Corcoran & Rowe
Washington, D.C.

Barbara Zak
Ord & Norman
Los Angeles, CA

REGISTER ONLINE:

THE EASIEST WAY TO REGISTER FOR THIS CONFERENCE IS ONLINE

YOU CAN DO THIS BY GOING TO WWW.REGONLINE.COM/STEP2011

REGISTRATION METHODS

- Via Online: www.regonline.com/step2011
- Via Fax: please complete this page and fax to (310) 586-0208

Title: _____

First Name: _____

Surname: _____

Preferred name on badge: _____

Firm: _____

Circle one: Atty | Accountant | Financial Planner | Trust Officer

Postal Address: _____

Tel No: _____ Fax No: _____

Email: _____

Access/Dietary Requirements: _____

PLEASE NOTE: We may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event.

PAYMENT METHODS

By Check:

Please issue a check payable to "S.T.E.P. - L.A." and mail it to Roxann Mehle, Greenberg Traurig, 2450 Colorado Avenue, Suite 400 East, Santa Monica, CA 90404..

By Credit Card:

We accept Visa, MasterCard, Discover, Diners Club and American Express

Name on card: _____

Credit Card No: _____

Card start date: ____ ____ ____ Expires: ____ ____ ____

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Signature of card holder: _____

Date: _____

I Plan To Attend (check one for each concurrent session)

Thursday (10:30 – 11:20 am)

Panel 2A – Fundamentals of United States Taxation of Foreign Trusts, Grantors and Beneficiaries

Or

Panel 2B – Advanced Planning for United States Beneficiaries of Foreign Trust

Thursday (2:45 – 3:45 pm)

Panel 5A – United States/Canada/United Kingdom Cross Border Estate and Family Business Planning

Or

Panel 5B – United States/Mexico Cross-Border Estate and Family Business Planning

Friday (10:55 am – 12:25 pm)

Panel 9A – United States/Latin America: Estate and Family Business Planning

Or

Panel 9B – Planning for Individuals and Their Businesses Into and From Greater China: PRC, Hong Kong and Taiwan

REGISTRATION FEE – please check corresponding box

Early Bird **US\$795**

This fee applies when you register and pay by April 4, 2011.

RATE AFTER APRIL 4, 2011

Regular Rate **US\$895**

Hotel Accommodations

Preferential rates have been negotiated at Shutters on the Beach Hotel, Santa Monica. These are available on a first-come first-served basis. To book, please call (800) 334-9000. Please make reference to "STEP Pacific Rim Conference".

CANCELLATIONS/SUBSTITUTIONS

Cancellations must be received in writing by April 18, 2011 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 Roxann M. Mehle by email mehler@gtlaw.com with any cancellations or substitutions.

Terms and Conditions

Conference documentation (including a convenient CD format) will be distributed at the event. 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. This booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of the fees due.

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Other: (Explain)
