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Business

IFZ Conference

# International Estate Planning Summit 2018

Latest trends in Estate Planning from a Swiss and Multijurisdictional Perspective

**Welcome Dinner:** 28 November, 6:45 p.m., tbd

**Summit:** 29 November 2018, 8:45 a.m. – 5:30 p.m., Brasserie Lipp, Zurich

Institute of Financial Services Zug IFZ

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# International Estate Planning Summit 2018

## Program Description

This «International Estate Planning Summit» is aimed at discussing and analyzing important aspects of international estate planning and tax transparency for a number of selected countries. The Summit will focus mainly on aspects that should be considered in tax and wealth planning for high net worth individuals and corporations from a multijurisdictional perspective.

In the morning, outstanding practitioners and scholars will share their expertise and experience on the latest trends on estate planning. This will include an overview of the current political landscape from a tax and regulatory perspective. Following that, the Summit will cover the recent developments in international tax transparency, focusing amongst other topics on the impact of BEPS and the Exchange of Information from a Swiss and from a Liechtenstein perspective, crypto currencies, holding companies and wealth management structures.

Also, the Summit will include an overview of wealth management and tax planning structures for Brazilian and Argentinian high net worth individuals. This will be followed by a panel discussion with case studies on asset protection in Switzerland, Liechtenstein, the United Kingdom and the United States.

In the afternoon, this Summit will analyse forced heirship rules in Switzerland, the United States, Italy, Austria and Spain on the basis of case studies. After that, the Summit will deal with digital estate planning (mails, cryptocurrencies, online accounts, amongst others).

The Summit will also cover the latest trends in global residency and citizenship matters, and the alternative use of life insurance for US and UK resident individuals with practical case studies. Finally, a panel discussion with case studies on real estate investment from a regulatory and tax perspective in Switzerland and Italy will take place.

## Speakers

**Gian Brändli**, Bär und Karrer, Zurich; **Dr. Lennart Chrobak**, University of Zurich, Zurich; **Raphael Cica**, KENDRIS AG, Zurich; **Giulia Cipollini**, Withers, Milano; **Robert Desax**, Walder Wyss AG, Zurich; **Frederico de Almeida Fonseca**, Rolim, Viotti e Leite Campos Advogados, Sao Paulo; **Laura Nanette Gambineri**, LL.M., Crown Global Insurance Group Zurich; **Riccardo Gambineri**, Crown Global Insurance Group, Zurich; **Alex Geissbühler**, Geissbühler Weber & Partner, Zurich; **Dr. Werner Jahnel**, LALIVE, Zurich; **Dr. Christian H. Kälin TEP IMCM**, Henley & Partners Ltd, Zurich; **Prof. Dr. Hans Rainer Künzle**, KENDRIS AG, Zurich/ University of Zurich, Zurich; **Alexandra Maeder**, Maeder Recht Derecho, Bern; **Dr. Roland A. Pfister**, Lucerne University of Applied Sciences and Arts/Badertscher Rechtsanwälte, Zurich/Zug; **Christoph Suter**, Bär und Karrer, Geneva; **Anna Szkudlarek**, KENDRIS AG, Zurich; **Sergio Mitsuo Vilela**, Julius Baer, Zurich; **Jacopo Zamboni**, Henley & Partners Ltd, Zurich

# Program

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08:45 a.m.	<b>Introduction and Welcome</b> Dr. Roland A. Pfister
08:50 a.m.	<b>Overview of the Political Landscape from Tax and Regulatory Perspectives</b> Recent developments and changes in the political landscape of Switzerland from a regulatory and tax perspective with regard to asset management companies, family offices and banks. Dr. Roland A. Pfister, Christoph Suter, Alex Geissbühler
09:30 a.m.	<b>Recent Developments on Tax Transparency and potential Tax Controversies</b> Territorial scope of the common reporting standard from a Swiss and Liechtenstein perspective, crypto currencies, holding companies and wealth management structures (foundations and trusts) which may lead to disputes with tax authorities. Anna Szkudlarek, Robert Desax
10:15 a.m.	Coffee break
10:45 a.m.	<b>Asset Protection in Selected Jurisdictions</b> Overview and case studies on asset protection in Switzerland, Liechtenstein, the United Kingdom and the United States. Prof. Dr. Hans Rainer Künzle
11:30 a.m.	<b>The Necessity of Estate Planning for Brazilian and Argentinian High Net Worth Individuals</b> Overview of wealth management structures and tax planning structures for Brazilian and Argentinian high net worth individuals. Frederico de Almeida Fonseca, Sergio Mitsuo Vilela
12:15 p.m.	Lunch
02:00 p.m.	<b>Panel Discussion on Forced Heirship Rules</b> Estate planning focusing on forced heirship rules in selected countries with case studies: Switzerland, United States, Italy, Austria and Spain. Raphael Cica (Switzerland/United States), Giulia Cipollini (Italy), Dr. Werner Jahnel (Austria), Alexandra Maeder (Spain)
02:45 p.m.	<b>Digital Estate Planning</b> Overview on access to mails, crypto currency accounts, online accounts and digital estate planning tools. Dr. Lennart Chrobak
03:30 p.m.	Coffee break

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03:45 p.m.	<b>Global Residency and Citizenship</b> Latest trends and opportunities with case studies. Dr. Christian H. Kälin, Jacopo Zamboni
04:20 p.m.	<b>Use of Life Insurance for US and UK Resident Individuals for Estate and Tax Purposes</b> Latest trends and opportunities with case study. Riccardo Gambineri, Laura Nanette Gambineri, LL.M.
04:40 p.m.	<b>Estate Planning Solutions for Swiss and Italian High Net Worth Individuals and Corporations from Inbound and Outbound Perspectives, Focusing on Case Studies</b> Latest trends and opportunities with case studies from a Swiss and Italian perspective. Gian Brändli (Switzerland), Giulia Cipollini (Italy)
05:30 p.m.	<b>Closing words/Apéro</b>

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# Organisation

## Target Groups

Employees, family offices, bankers, tax consultants, trustees, fund managers, asset managers, auditors, lawyers, government officers, practitioners, consultants, accountants in financial market industries, financial intermediaries and investors, in particular from Argentina, Brazil, Switzerland, Italy, Austria, Spain, Liechtenstein, the United Kingdom and the United States.

## Date & Time

Thursday, 29 November 2018, 8:45 a.m. – 5:30 p.m.

A welcome dinner will be held the evening before, on 28 November 2018, 6:45 p.m.

## Cost

- CHF 690.–, per person, including conference materials, lunch and apéro.
- CHF 940.–, per person including the welcome dinner on the evening of 28 November 2018.

## Venue

The Summit will be held at the Brasserie Lipp, Zurich.

## Application

Deadline is 1 November 2018

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Registration will be first-come, first-served and is limited.

## Information

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## Contact

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