



STEP USA News

Dear Member,

Welcome to the fall edition of the STEP USA Member News, bringing you all the latest information for events and news within the US.

News for fall:

1. STEP Expansion into New Markets

STEP is delighted to announce the approval of two new Chapters in the US; STEP Long Island and STEP San Diego. If you have colleagues based in these areas, please tell them to contact [Jeryl Pine](#).

2. EisnerAmper Wins Coveted STEP Award

EisnerAmper LLP received the North American Team of the Year Award at the STEP Private Client Awards, held on September 15, 2011 in London. The firm's Personal Wealth Advisor's practice was represented by Brent Lipschultz and Jack Meola, who joined 670 other top-level professionals in trusts, estates and private client work at the event. Entries for the 2012/2013 awards will open on 01 March, 2012 with the ceremony taking place in London on 19 September, 2012.

3. STEP Presence at Connecticut Bar Association

STEP were delighted to support the recent Federal Tax Institute of New England. The event attracted a fantastic array of speakers and was a great opportunity for STEP to reach out to potential members.

4. Visit the STEP Booth in Seattle

On the West Coast, STEP will be hosting a booth at the Seattle Bar Association Conference on October 31 - November 01. In attendance at the Seattle event will be Larry Heller, Chair of STEP USA, Jeryl Pine, Membership Director of STEP USA and Dorothy Foster, Chair of STEP Seattle. If you or your colleagues are planning to attend the event, please do come to the STEP booth and say hello.

5. Don't Forget STEP USA's New Member Special

As part of STEP USA's on-going commitment to expand your network across the states, from now until February 14, 2012 new members can receive up to five months of free membership. The one-time joining fee for the TEP designation will also be waived. If you know of a colleague who would benefit from STEP membership, then please do let them know about the [special](#).

6. Dates for your diaries

In this edition

[STEP USA News »](#)

[Articles of Interest... »](#)

[Your USA Contacts »](#)

[USA Events »](#)

[Visit Your Branch Page »](#)

[Member Network »](#)

[Jurisdictional Information »](#)

USA Events

[12th International Tax and Trust Training Program](#)

Miami
October 13, 2011

[The Nuts & Bolts of Expatriation](#)

New York
October 18, 2011

[Update on French Tax & Trust Law Changes 2011](#)

New York
October 24, 2011

[FI BA Risk Management Conference](#)

Miami
October 24, 2011

[Hot International Tax Developments Every Practitioner Needs to Know About](#)

New York
October 25, 2011

[Tax Compliant Offshore Investing - Still Possible?](#)

Pennsylvania

- The STEP **Boston** inaugural luncheon is scheduled for October 12, 2011. Presentations will be made by STEP Boston's Nancy Keller-Go and Melissa Langa and STEP Worldwide's David Harvey. G. Warren Whitaker will speak on 'Advising the Multinational Client: Ten Potential Traps and How to Avoid Them'. For more details, visit the [STEP website](#).

- On October 17, 2011 a first **Orange County** STEP event 'Cultural challenges when working with foreign-born clients' will be held in Newport Beach, CA from 5.00pm to 7.30pm. Please contact [Kathy Mericle](#) for further details.

- A tentative date of December 08 or 09, 2011 is scheduled for a 'What is STEP' information meeting in **Texas**. Please contact [Jenna Tabakman](#) for more information.

Lawrence H. Heller
STEP USA Chairman

[Back to top >](#)

October 25, 2011

[International Income Tax & Estate Planning 2011](#)

Miami
October 27, 2011

[STEP Asia Conference 2011](#)

Singapore
November 01 - 02, 2011

[FATCA Update](#)

Miami
November 04, 2011

[Foreign Accounts Tax Compliance Act of 2009](#)

New York
November 08, 2011

[STEP LATAM Conference](#)

Panama
November 17 - 18, 2011

[NYSBA & STEP Event: Save the Date](#)

New York
March 22 - 23, 2012

Articles of Interest...

Three companies lose claims for sham tax deductions

The US Justice Department has won three cases against tax planning schemes used by American companies. The schemes generated deductions of hundreds of millions of dollars.

[Reuters](#)

Statistics on IRS requests for foreign tax information

US Congress investigators have published figures on the number of tax information requests made to other countries by the Internal Revenue Service, regarding US persons' tax liabilities.

[General Audit Office](#)

[Reuters](#)

[Statement by Senator Carl Levin](#)

NRA estate tax may be in breach of treaties

An Israeli lawyer argues that the US estate tax on non-resident aliens is inefficient and damaging to inward investment, and so unfair to foreigners that it might violate US income tax treaties.

[Taxprof \(PDF file\)](#)

Nevada's shell game now second only to Delaware

Reuters publishes a special report on Nevada, now the USA's second largest state in terms of shell companies with concealed ownership.

[Reuters](#)

Why sanctions matter

Following the tenth anniversary of 9/11, the STEP Journal considers how sanctions in the US have shot up the scale of risks prioritised by financial institutions.

[STEP](#)

[Back to top >](#)

Visit Your Branch Page

[Chicago](#)

[Los Angeles](#)

[Miami](#)

[Mid Atlantic](#)

[New York](#)

[San Francisco](#)

[Seattle](#)

Member Network

[Find a STEP Member Outside the USA](#)

Jurisdictional Information

View the [STEP USA jurisdictional information page](#) for articles, developments, practice trends and more

Your USA Contacts

Visit your [branch page](#) on the STEP website for full details of your branch committee members.

Chair of STEP USA - Mr Lawrence H. Heller TEP
Secretary of STEP USA - Ms Benetta P Jenson, TEP JD
STEP USA Membership Director - Jeryl Pine

If you have colleagues who may be interested in joining STEP USA, please email [Jeryl Pine](#).