



NYSBACLE & STEPUSA

Thursday and Friday,
March 23-24, 2017

Crowne Plaza Times Square Manhattan
New York City

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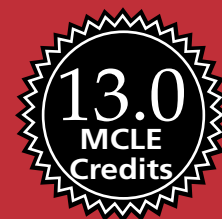
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See inside for more details.



13th Annual International Estate Planning Institute

A distinguished international panel will exchange ideas and discuss developments regarding international estate planning including:

- U.S. Taxation of Non-U.S. Persons, Foreign Trusts and Non-Citizen Spouses
- Private Placement Life Insurance: Legal and Practical Issues
- Complex Issues in Foreign Trusts
- Latest Developments in CRS and FATCA
- Current Topics in Canadian-U.S. Estate and Trust Planning
- Mexican-U.S. Estate Planning
- Practical Issues in Moving Trusts Offshore and Onshore
- U.S. SEC and Regulatory Issues for International Families
- PFIC/CFC/Subpart F
- Ethical Issues Regarding Offshore Accounts and Foreign Clients

...plus regional updates!

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Ellen Kratzer
Managing Director, Fiduciary
Trust Company International
New York, NY



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

Speakers (in alpha order)

Henry P. Alden II, Managing Member, Everest International Group, LLC, Baltimore, MD; **Leigh-Alexandra Basha**, Institute Vice Chair, Partner, McDermott Will & Emery LLP, Washington, DC; **Richard E. Andersen**, Partner, Wilmer Cutler Pickering Hale & Dorr LLP, New York, NY; **Stanley A. Barg**, Institute Vice Chair, Partner, Kozusko Harris Duncan LLP, New York, NY; **Roy A. Berg**, Director, U.S. Tax Law; Barrister and Solicitor, Calgary, Alberta; **Michael Betley**, Group Chairman, Trust Corporation of the Channel Islands Limited, Guernsey; **Rachel L. Blumenfeld**, Partner, IRDERLIS,,0, Toronto, Ontario; **Michael Cadesky**, Managing Partner, Cadesky Tax, Toronto, Ontario; **Robert D. Colvin**, Principal, Robert D. Colvin & Associates, Houston, TX; **Peter Cotorceanu**, Founder and CEO, G&TCA; Of Counsel, Anaford Attorneys at Law, Zurich, Switzerland; **M. Katherine Davidson**, Partner, Henderson, Caverly, Pum & Charney LLP, San Diego, CA; **Enrique Hernandez-Pulido**, Partner, Procopio, San Diego, CA; **Gregory H. Kahn**, Counsel, Day Pitney LLP, Stamford, CT; **Natalia Murphy**, Director, Wealth Planner, Citi Private Bank, New York, NY; **Michael Liebeskind**, Principal, Winged Keel Group and SALI Fund Services, New York, NY; **Miles C. Padgett**, Kozusko Harris Duncan LLP, Washington, DC; **Gideon R. Rothschild**, Institute Co-Chair, Partner, Moses & Singer LLP, New York, NY; **Dina Kapur Sanna**, Partner, Day Pitney LLP, New York, NY; **G. Warren Whitaker**, Institute Chair, Partner, Day Pitney LLP, New York, NY; **Bruce Zagaris**, Partner, Berliner Corcoran & Rowe LLP, Washington DC

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Cancellations are easy – full refunds are given: Your full registration fee will be refunded if you give us notice no later than close of business (4:45 p.m.) on **Friday, March 10, 2017**. To cancel, you must call the Member Resource Center (800) 582-2452. Cancellation notifications received after close of business **Friday, March 10, 2017** will be assessed a \$75 cancellation fee. In the alternative, you may wish to transfer your registration to a colleague at no charge. If you do not cancel and do not attend the program, a copy of the printed course materials will be mailed to you in consideration of the registration fee. Non-registrants may purchase program materials after the final program date.

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Program Location

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Thursday & Friday
March 23-24, 2017
New York City
PC: (0EN34)

Crowne Plaza Times Square, Manhattan
1605 Broadway
New York, New York 10019
(212) 977-4000

A limited number of rooms have been "reserved" at the Crowne Plaza Times Square Manhattan for those attending the 13th Annual International Estate Planning Institute. The discounted rate of \$254.00 for a standard room on March 22-24, 2017 will be available on a first-come basis until **Thursday, February 23, 2017**. Reservations should be made directly with Crowne Plaza reservations at 1-888-233-9527.

 See our Spring 2017 schedule online at www.nysba.org/cle



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