

# STEP WYOMING 2017

## INTERNATIONAL ESTATE PLANNING CONFERENCE

### Current Issues Impacting the International and U.S. Based Private Client

Hear the latest topical issues and developments impacting the international and U.S. based private client at the STEP Wyoming International Estate Planning Conference 2017. The agenda includes opportunities to network with fellow practitioners in the beautiful setting of the Four Seasons, Jackson Hole as well as free time to enjoy the nearby national parks. Secure your place today!

### Agenda Focus:

- Update on Current Estate Planning Items
- Foreign Trusts: Classification, Tax and Reporting Implications
- Planning for International Families in the New World Order
- Investment Advisory Expenses: Minimizing Impact of the New Rules and Maximizing Deductions
- Comprehensive Model for a Humane Trustscape

**View full agenda on reverse**

### SPEAKERS INCLUDE:

**Elizabeth Bawden TEP**  
Withers Bergman LLP, USA

**Simon Beck TEP**  
Baker & McKenzie LLP, USA

**Hartley Goldstone**  
Wise Counsel Research Associates, USA

**Michelle Graham TEP**  
Withers Bergman LLP, USA

**Jennifer McCall TEP**  
Pillsbury Winthrop Shaw Pittman LLP, USA

**Domingo P. Such, III**  
Perkins Coie, USA

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# STEP WYOMING 2017

## INTERNATIONAL ESTATE PLANNING CONFERENCE

### Current Issues Impacting the International and U.S. Based Private Client

#### FRIDAY, SEPTEMBER 15, 2017

3:30pm	Registration
4:00pm	Update on Current Estate Planning Items <i>Jennifer McCall TEP, Pillsbury Winthrop Shaw Pittman LLP, USA</i>
5:00pm	Foreign Trusts: Classification, Tax and Reporting Implications <i>Elizabeth Bawden TEP, Withers Bergman LLP, USA</i> <i>Michelle Graham TEP, Withers Bergman LLP, USA</i>
6:00pm	Cocktail Reception & Dinner Cottonwood Terrace, Four Seasons, Jackson Hole
8:30pm	Adjourn

#### SATURDAY, SEPTEMBER 16, 2017

7:00am	Continental Breakfast
8:00am	Interactive Round Table Discussion & Breakfast <b>Moderators:</b> <i>Stanley A. Barg TEP, Kozusko Harris Duncan, USA</i> <i>M. Katharine Davidson TEP, Henderson, Caverly, Pum &amp; Charney LLP, USA</i> <i>Lawrence H. Heller TEP, Greenberg Traurig LLP, USA</i> <i>William J. Kambas, Withers Bergman LLP, USA</i> <i>Joseph Kellogg TEP, WE Family Offices, USA</i> <i>Ellen Kratzer TEP, Fiduciary Trust Company International, USA</i>
9:00am	Planning for International Families in the New World Order <i>Simon Beck TEP, Baker &amp; McKenzie LLP, USA</i>
9:55am	Networking & Refreshments
10:10am	Investment Advisory Expenses: Minimizing Impact of the New Rules and Maximizing Deductions <i>Domingo P. Such, III, Perkins Coie, USA</i>
11:05am	Comprehensive Model for a Humane Trustscape <i>Hartley Goldstone, Wise Counsel Research Associates, USA</i>
12:00pm	Interactive Round Table Discussion & Lunch <b>Moderators:</b> <i>Stanley A. Barg TEP, Kozusko Harris Duncan, USA</i> <i>M. Katharine Davidson TEP, Henderson, Caverly, Pum &amp; Charney LLP, USA</i> <i>Lawrence H. Heller TEP, Greenberg Traurig LLP, USA</i> <i>William J. Kambas, Withers Bergman LLP, USA</i> <i>Joseph Kellogg TEP, WE Family Offices, USA</i> <i>Ellen Kratzer TEP, Fiduciary Trust Company International, USA</i>
1:30pm	Conference Close

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#### WE ARE STEP

STEP is the global professional association for practitioners who specialise in family inheritance and succession planning. We work to improve public understanding of the issues families face in this area and promote education and high professional standards among our members. STEP members help families plan for their futures, from drafting a will to advising on issues concerning international families, protection of the vulnerable, family businesses and philanthropic giving. Full STEP members, known as TEPs, are internationally recognised as experts in their field, with proven qualifications and experience. For more information on STEP membership please visit [www.step.org](http://www.step.org)



#### CONFERENCE ACCOMMODATION

Reservations can be made directly with Four Seasons by calling 307-732-5175. Please reference STEP Wyoming.

#### Who Should Attend:

Trust and Estate Attorneys,  
Tax Attorneys, Accountants,  
Trust Officers, Financial Planners,  
Investment Advisors

#### REGISTRATION

for the event is available online at:

[www.regonline.com/  
stepwyoming2017conference](http://www.regonline.com/stepwyoming2017conference)

**Standard Registration Rate**  
**\$495.00**

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