# Agenda

**FRIDAY, JUNE 1, 2018**

**FOUR SEASONS HOTEL MIAMI, 1435 BRICKELL AVENUE, MIAMI, FLORIDA 33131**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:45am</td>
<td>Registration and Breakfast</td>
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<tr>
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<td>Sponsored by Jackson Hole Trust Company</td>
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<tr>
<td>8:30am</td>
<td>Opening Remarks</td>
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<td></td>
<td>Juan Manuel Gonzalez, Banco Itau International, USA</td>
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<td>Armando Hernandez, H&amp;CO</td>
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<tr>
<td>9:00am</td>
<td>Latin American Updates</td>
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<td>Moderator: Erika Litvak, Greenberg Taurig PA</td>
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<td>Jaime Carey, Carey, Chile</td>
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<td>Juan David Velasco, Posse Herrera Ruiz, Colombia</td>
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<td>William Heuseler, Itau Private Bank International, Brazil</td>
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<td>Abel Francisco Mejia Cosenza, Sanchez Devanny, Mexico</td>
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<tr>
<td>10:25am</td>
<td>Morning Coffee Break</td>
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<td>Sponsored by Christiana Trust</td>
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<tr>
<td>10:50am</td>
<td>Artificial Intelligence &amp; Exponential Revolution</td>
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<td>Hod Lipson, Singularity University</td>
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<td>11:50am</td>
<td>Ethical Considerations with International Clients</td>
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<td>Scott D. Michel, Caplin &amp; Drysdale</td>
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<tr>
<td>12:50pm</td>
<td>Lunch</td>
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<td>Sponsored by Vistra</td>
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<td>1:30pm</td>
<td>Networking and Dessert Break</td>
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<td>Sponsored by BFSB - Bahamas</td>
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<td>2:00pm</td>
<td>US Tax Reform / Pre-Immigration Planning</td>
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<td>Moderator: Hal Webb, Bilzin Sumberg</td>
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<td>Stewart Kasner, Holland &amp; Knight LLP</td>
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<td>Shelly Meervitch, AB Bernstein</td>
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<td>3:00pm</td>
<td>Mega Trends Impacting the Future of the Family Office</td>
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<td>Moderator: Joe Kellogg, WE Family Offices</td>
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<td>Mary K Duke, Independent Advisor to Families</td>
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<td>Stacy Allred, Merrill Lynch</td>
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<td>4:00pm</td>
<td>Afternoon Coffee Break</td>
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<td>Sponsored by Commonwealth Trust Company</td>
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<tr>
<td>4:25pm</td>
<td>Artificial Intelligence &amp; Wealth Management: Tying it All Together</td>
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<td>Moderator: Simon Beck, Baker &amp; McKenzie LLP</td>
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<td>Adam Clark, JP Morgan</td>
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<td>Sean Tevel, Holland &amp; Knight LLP</td>
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<tr>
<td>5:25pm</td>
<td>Raffle / Closing Remarks</td>
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<td>Sponsored by Primus Trust Corp.</td>
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<tr>
<td>5:30pm</td>
<td>Cocktail Party</td>
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<td>Sponsored by PICTET</td>
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**REGISTRATION FEES:**

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<thead>
<tr>
<th>Category</th>
<th>Early-Bird Rate</th>
<th>After April 30, 2018</th>
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<tbody>
<tr>
<td>STEP Members</td>
<td>USD 350</td>
<td>USD 450</td>
</tr>
<tr>
<td>Non-Members</td>
<td>USD 450</td>
<td>USD 525</td>
</tr>
<tr>
<td>Qualified Students*</td>
<td>USD 70</td>
<td>USD 150</td>
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*LLM Students - Limit 10 Students

Secure your place at **www.step.org/miami-summit18**

**Contact:** Tatiana Merlo, STEP Miami  
step.miami@step.org

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Erika Litvak (Moderator)  
Greenberg Traurig, P.A., Florida, USA

Erika G. Litvak is a shareholder in the Miami office of international law firm Greenberg Traurig, P.A. She concentrates her practice on international taxation and is a member of the Florida Tax Team that received consistently over the years a Band 1 ranking given by Chambers & Partners USA Guide. Ms. Litvak has been selected every year since 2012 a Rising Star by Super Lawyers Magazine. In 2015, she was listed also as a Rising Star by the Daily Business Review and by Euromoney’s Expert Guides.

Ms. Litvak assists individuals with international income tax and estate planning, expatriation, pre immigration tax planning, formation of foreign trusts, international reporting and compliance issues, and structuring investments in the United States. She also assists U.S. and foreign businesses in cross-border transactions, FATCA compliance, investments of U.S. entities abroad, investments of foreign entities in the United States, and other matters related to international taxation. She is a frequent speaker on international tax issues and one of the principal drafters of the comments submitted by the Florida Bar Tax Section to the FATCA Proposed Regulations and earlier IRS Notices. She is a former adjunct professor at the University of Miami School of Law, LLM in Taxation and is the immediate past Chair of STEP Miami. Ms. Litvak is admitted to practice law in Florida as well as Buenos Aires, Argentina, and is fluent in English and Spanish and speaks conversational Hebrew. She graduated magna cum laude from the University of Miami School of Law and with honors from the University of Buenos Aires, College of Law.

Jamie Carey  
Carey, Chile

Jaime Carey is a Managing Partner and co-head of Carey Tax Group. He is a member of several company boards of directors, including Austin International, Sencorp, Banmédica (UnitedHealth Group) and Evercrisp (Frito Lay Chile), and chairman of the Board of Metlife Chile.

Mr. Carey is also a member of the International Bar Association (IBA), and currently is Chair of the Legal Practice Division. He has previously held other positions with the IBA as Chair of the Latin American Forum and Co-Chair of the Corporate and M&A Law Committee. He is currently a member of Management Board of the IBA and is Vice-Chair of the Legal Practice Division. Also, he is president of The Society of Trust and Estate Practitioners (STEP) in Chile (in formation).

Juan David Velasco  
Posse Herrera Ruiz, Colombia

Juan David Velasco’s practice focuses in international tax law and transactional tax planning. Another focus in his practice is international trade. He has advised numerous public and private companies across different industries, as well as private equity and venture capital funds, on domestic and multi-jurisdictional tax aspects of project finance, merger, acquisitions and dispositions of business interests. He also works with high-net-work individuals in private wealth management and tax-efficient estate planning strategies.

He received his J.D (with Award for Excellence in honors thesis) and a Graduate Diploma in Tax Law from Universidad de los Andes (Colombia), his LL.M. in Taxation from Boston University School of Law, and his LL.M. in International Law from The Fletcher School at Tufts University (USA). He also attended the Program on Negotiation at Harvard Law School, where he received a Diploma in Negotiation.
SPEAKERS

William Heuseler, JD, LLM, TEP
Itaú Private Bank International, USA

William Heuseler is the Global Head of Wealth Planning & Fiduciary Services of Itaú, Private Bank. He is a Tax, Trust and Estate Planning Attorney with more than 20 years of experience dealing with ultra-high net worth clientele, with the expertise on cross-border matters, tax and asset protection planning; family and corporate governance among other wealth planning strategies. Prior to Itaú, William worked at UBS AG, in New York, as country coordinator of the Brazilian Wealth Planning Team - Offshore Platform; at Smith Barney-Citigroup as a Wealth Planner; at Safra Group in New York, as the head of the Legal and Trust Affairs division and at Citco Group as a Trust Officer. In Brazil, William worked at Banco Marka S.A. where he was made an associate partner as well he was the head of the legal team. He started his career at Baker & McKenzie’s office in Rio de Janeiro, Brazil.

William is one of the founding members and former Chair of STEP Brazil. He is also a member of the Board of Directors of BIE Bank & Trust (Bahamas) Ltd. and of the Advisory Counsel of the Brazilian American Chamber of Commerce of Florida. He is a former member of the Board of Trustees of the American Repertory Ballet. William actively writes articles about cross-border planning for Brazilian families and has been a guest speaker at several conferences and seminars in the U.S., Europe, the Caribbean and Latin America.

Abel Francisco Meija Cosensa
Sanchez Devanny, Mexico

Abel specializes in international tax planning for both individuals and corporations. Highly experienced in Tax Consulting & Litigation, Private Wealth Management/Estate Planning, Private Equity; Mergers & Acquisitions. He has more than 13 years of experience practicing law. Abel is licensed to practice law in Mexico and in the US (California license). His native language is Spanish and fluent in English and French.

Abel counts with a Law Degree of the Universidad Panamericana, Mexico City; a General University Studies Diploma of the Université Jean Moulin, Faculté de Droit Lyon, France; a Postgraduate Studies in Tax Law of the Universidad Panamericana, México City; and a Master of Laws (LL.M.) in International Taxation from the New York University School of Law.

Abel is affiliated among others, in the California Bar; in the American Bar Association-Tax Section; in the International Bar Association-Individual Tax & Private Client Committee; in the Society of Trust & Estate Practitioners of the San Diego Chapter; and in the Mexican-French Chamber of Commerce México/Bajío Chapter. Abel is a recommended lawyer for “The Legal 500 Latin America 2017”, and ranked in “The Latin America Chambers and Partners 2018”. He has participated in different publications and presentations for diverse associations and companies such as STEP, Florida Bar, International Bar Association and US-Mexico Bar Association.

Hod Lipson
Singularity University, New York, USA

Hod Lipson is a professor of Engineering and Data Science at Columbia University in New York, and a co-author of the award winning book “Fabricated: The New World of 3D Printing”, and “Driverless: Intelligent Cars and The Road Ahead”, by MIT Press (translated into 7 languages). Before joining Columbia University in 2015, Hod spent 14 years as a professor at Cornell University. He received his PhD in 1999 from the Technion – Israel Institute of Technology, followed by a Postdoc at Brandeis University and MIT.

Hod Lipson’s work on self-aware and self-replicating robots challenges conventional views of robotics, and has enjoyed widespread media coverage. He has also pioneered Open-source 3D Printing, as well as Electronics 3D Printing, Bio-printing and Food printing. Lipson has co-authored over 300 publications that received over 14,000 citations to date. He has co-founded four companies, and is frequent keynoter both in industry and academic events. His TED talk on self-aware machines is one of the most viewed presentations on AI and Robotics. Hod directs the creative machines lab, which pioneers new ways to make machines that create, and machines that are creative.
Scott D. Michel  
*Caplin & Drysdale, USA*

Scott D. Michel is a Member of Caplin & Drysdale and has been with the firm since 1981. He is on the firm’s Board of Directors, and served as the firm’s President from 2007-2015.

Mr. Michel has been a criminal tax defense lawyer for 37 years. He has represented individual and corporate clients in grand jury and administrative criminal tax investigations and sensitive civil examinations. He is internationally recognized for his extensive experience in handling matters arising from the U.S. government’s recent crackdown on undeclared foreign accounts and is currently representing numerous clients worldwide in related audits and investigations. He has also represented numerous financial institutions in the DOJ Swiss Bank Program, and advised other institutional clients, both foreign and U.S., in connection with the government’s crackdown on unreported offshore assets.

Mr. Michel is an Adjunct Professor of Law at the University of Miami School of Law Graduate Program in Taxation. He is also a Fellow of the American College of Tax Counsel, and is the Vice Chair for Committee Operations of the ABA Section of Taxation. Mr. Michel previously chaired the Tax Section’s Committees on Civil and Criminal Tax Penalties and the Standards of Tax Practice Committee and served as a Council Director.

Hal Webb (Moderator)  
*Bilzin Sumberg, Florida, USA*

Hal J. Webb is a trusted advisor and counselor to high-net-worth international families. He is Head of Bilzin Sumberg’s International Private Client Services and Partner in the Firm’s Tax & Estate Planning Group. Hal’s practice focuses on advising high-net-worth private clients in all aspects of international tax and estate planning. He also advises family offices and trust companies. Hal frequently deals with foreign trusts with U.S. beneficiaries, pre-immigration planning for foreigners moving to the U.S., large gifts and inheritances being received by U.S. persons from foreign persons or foreign estates, tax compliance and voluntary disclosures, structuring a foreign person’s investment into the U.S. (particularly the acquisition of business interests and residential and commercial real estate), and expatriation planning. He also handles matters involving tax planning for foreign companies doing business in the U.S. Hal’s technical expertise helps him tailor a solution which best fits the needs of his clients. Hal is discreet and highly professional. Hal is a frequent author and lecturer on various topics of international tax and estate planning. Additionally, he is Chair of the International Tax In-Bound Committee of The Florida Bar Tax Section, and the immediate Past Chair of the Miami Branch of STEP. Hal has consistently been recognized by legal publications and by his peers as being a top tax and estate planning lawyer, including being named in Chambers HNW Private Wealth Law in the USA and Florida, The Best Lawyers in America, Florida Super Lawyers, Best of the Best USA, Citywealth Leaders List, Legal Week International Trusts & Private Client Elite, and Guide to the World’s Leading Trusts & Estates Practitioners. Hal received his LL.M. from the University of Florida, his J.D. from Widener University Delaware Law School, and his B.A. from the University of Miami.
Stewart L. Kanser
Holland & Knight LLP, Florida, USA

Stewart Kanser is a Private Wealth Services attorney in Holland & Knight’s Miami office, where he focuses primarily in the areas of international taxation, trusts and estates. Mr. Kanser routinely advises foreign and domestic clients on U.S. federal income, gift and estate tax matters associated with their cross-border investments, including U.S. real estate investments and business activities, as well as pre-immigration tax planning. His practice also includes forming and overseeing complex international corporate and trust structures, as well as implementing international reorganizations.

Mr. Kanser has extensive experience in offshore trust instruments, U.S. fiscal information reporting, Foreign Account Tax Compliance Act (FATCA), Common Reporting Standard (CRS), voluntary disclosures and withholding tax compliance. He also advises on the development and purchase of offshore private placement U.S. tax compliant life insurance and annuity contracts.

In the community, Mr. Kanser has served as an adjunct professor of federal income taxation and estate planning at St. Thomas University School of Law, Florida International University College of Law and the University of Miami. He also represents indigent clients in connection with their U.S. tax controversies through Put Something Back, a joint pro bono project of the Eleventh Judicial Circuit of Florida and the Miami-Dade County Bar Association in conjunction with Legal Services of Greater Miami. Mr. Kanser is Board Certified in Tax Law by The Florida Bar and recognized in Legal 500, Best Lawyers in America and Chambers High Net Worth Guide.

Shelly Meerovitch, JD
Wealth Strategies Group, New York, USA

Shelly Meerovitch, JD, is a Director and Senior Vice President in the Wealth Strategies Group in Bernstein’s New York office. She brings 20 years of expertise in international and domestic trusts and estate issues. Before joining Bernstein, Shelly was a partner of the law firm Katten Muchin Rosenman LLP in New York. She focuses on international planning, and works with our high-net-worth clients and their professional advisors to optimize structures for tax-efficient investment in the US, wealth transfer to US beneficiaries, and the creation and administration of global trusts. Shelly is a member of the State Bar of New York, and has written on many pre-immigration planning and cross-border tax issues. She is a member of the London-based Society of Trusts and Estates Practitioners (STEP). Shelly graduated Phi Beta Kappa from the University of California Los Angeles with a BA in psychology, summa cum laude, and earned a JD from Columbia Law School.

Joseph C. Kellogg (Moderator)
WE Family Offices, Florida, USA

Joseph Kellogg helps wealthy families to make informed decisions within their wealth enterprise. As partner of WE Family Offices, he works with clients to identify their unique objectives and challenges and to implement a comprehensive planning strategy in coordination with their estate and tax planning professionals.

Prior to working with the multi-family office, Joseph provided wealth-planning services for international private clients of UBS AG (Miami) and of HSBC Private Bank (Miami). In 2002, he opened and managed the Miami representative office for the Amicorp Group providing corporate and fiduciary structures to both corporate and private clients. From 1997 to 2002, Joseph worked with the Citco Group of companies and was based in Curacao, and later in the British Virgin Islands. He is former Chair and Board Member of STEP Miami Branch and former Vice-Chair and Board Member of STEP USA. He is currently a Board Member for the STEP Latam Conference.

Joseph is an attorney licensed in New York and Florida and received his J.D. from the American University in Washington, D.C., his LL.M. (Tax) from the University of Miami, and studied in a one-year master in law program at the Escuela Libre de Derecho in Mexico, D.F. He is fluent in Spanish.
Mary Duke
Independent Advisor to Families, USA
Mary Duke is an internationally recognized advisor to families navigating the complexities of substantial wealth. She is known for her expertise in generational transition in family businesses and the impact of trusts on families. Mary’s work is typically anchored in the facilitation of family meetings, mentoring of family members and strategic planning for family owned businesses where she focuses on empowering rising generations and helping families leverage governance to enhance their decision-making and collaboration. With a background in law, business and finance, and training in family systems and managing family conflict, she has an excellent track record helping families conceive and achieve positive outcomes.

Stacy Allred
Merrill Lynch’s Center For Family Wealth Dynamics and Governance, USA
Stacy Allred is a Managing Director and Head of Merrill Lynch’s Center for Family Wealth Dynamics and Governance®. Stacy joined Merrill Lynch in 1999 in the San Francisco office and relocated to the Seattle area in 2005. Previously, she spent nine years with Ernst & Young LLP providing comprehensive financial planning and tax services to multi-generational family groups and executives.

Working in San Francisco, at the height of the dot com boom, Stacy saw that wealth brings not just opportunities, but challenges, and broadened her approach to planning. Stacy enjoys engaging with curious families and individuals committed to lifelong learning and capacity building. She has found that engaging in experiential learning to develop skills - financial, wealth, governance, business and philanthropic – is a powerful practice to help family members effectively integrate wealth. Her work focuses on the practical application of family governance and the facilitation of family meetings.

Stacy speaks nationally on the topics of family wealth, including Merrill Lynch’s Financial Boot Camps, in partnership with UCLA Anderson, Penn Wharton and Georgetown McDonough School of Business, and the Investment and Wealth Institute’s Certified Private Wealth Advisor program.

Stacy earned her BS in Accounting and Business. Stacy earned a Masters in Taxation, with distinction, from DePaul University. Stacy is a Certified Financial Planner™, Personal Financial Specialist and Certified Public Accountant (California). Additionally, she holds Series 2, 7, 24, 63, 65 and 66 FINRA registrations and is a member of Collaboration for Flourishing Families and the Purposeful Planning Institute.

Stacy enjoys volunteering in the public schools teaching financial literacy to elementary school students. Additionally, Stacy delivers CHOICES to Middle School students to help curtail the high school dropout rate.

Simon Beck (Moderator)
Baker & McKenzie LLP, USA
Simon Beck is a partner and Chair of the North America Wealth Management Group at Baker McKenzie. As an international tax and trust lawyer with vast experience working in the world’s trust and financial centers, he practices in the Firm’s New York and Miami offices. Simon focuses his practice on international tax and trust planning, as well as US federal and international securities and banking regulations. He advises the world’s wealthiest families, global institutions, family offices and trust companies, and is a recognized leader in the use of Private Trust Companies.

Simon lectures regularly on trust, financial service and compliance issues at global wealth management and international trust and estate planning conferences around the world.
Adam Clark  
**J.P. Morgan, USA**

Adam Clark is Global Head of Trusts and Estates at J.P. Morgan Private Bank, overseeing approximately $160 billion in assets across the globe. One of the industry’s recognized trust and estate professionals, he leads approximately 500 employees who advise and support clients’ legacy planning and management.

A leading fiduciary specialist, Mr. Clark has held various leadership positions in the industry. As Chairman, Chief Executive Officer and President of Goldman Sachs Trust Company, he led a team that operated in five jurisdictions and oversaw $24 billion in assets. During his tenure, he also served as Head of International Strategic Wealth Advisory, where he worked directly with the firm’s most sophisticated clients. Previously, Mr. Clark spent nearly a decade with WTAS LLC, formerly Arthur Andersen, where he focused on tax planning issues for families with multi-jurisdiction considerations, including multiple citizenships and residencies, as well as global business and investment interests.

A graduate of the University of Liverpool, with a Bachelor of Laws in English and German Law, Mr. Clark lives with his family in New Jersey.

Sean Tevel  
**Holland & Knight LLP, Florida, USA**

Sean Tevel is a Miami private wealth services attorney who focuses his practice primarily on tax planning for high-net-worth individuals, as well as tax planning for multinational corporate and trust structures. Mr. Tevel advises foreign and domestic clients on U.S. federal income, gift and estate tax matters associated with their cross-border investments, including their U.S. real estate investments and business ventures.

Mr. Tevel has significant experience advising clients with respect to corporate and partnership taxation, the application of the Foreign Investment in Real Property Tax Act of 1980 (FIRPTA) and tax treaty issues. He also is well-versed in domestic and offshore tax compliance, including providing advice with respect to the Foreign Account Tax Compliance Act (FATCA), the Common Reporting Standard (CRS) and withholding tax compliance.
STEP GLOBAL CONGRESS 2018
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The Westin Bayshore, Vancouver

Early Bird closes 29 June 2018

KEYNOTE SPEAKERS:
Prof. Jason Sharman
University of Cambridge, UK
Leanne Kaufman TEP
RBC Wealth Management, Canada
Ivan Sacks TEP
Withersworldwide, USA
Mark McMullen
Stonehage Fleming, Switzerland
Desmond Teo
EY, Singapore
Dr. Liane Davey
Author, Canada
Bill Mitchell
Townsville Community Legal Service, Australia

Programme Focus:
• Towards a UN convention on the rights of older persons
• Serving the new global clientele: tools for 21st-century advisors in a fast-changing environment
• The bad and the good of the rise of AI in society
• True family wealth: rethinking money, success and succession
• Countering cross-border financial crime: how well does the system work and how could it work better?

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Juan Manuel Gonzalez
STEP Miami Branch Chair
Juan Manuel González is Head of Wealth Planning for Spanish Speaking Countries at Banco Itaú International in Miami. Mr. González has an extensive background in law and tax issues and specializes in implementing wealth planning strategies for high and ultra-high net worth clients. He holds an LL.M. in Taxation from the University of Miami, FL, with a specialization in International Tax, a Master in Colombian Tax Law from Colegio Mayor De Nuestra Señora Del Rosario, and a JD (equivalent) from Universidad De La Sabana, Bogotá, Colombia. Mr. González has been a member of the Society of Trust and Estate Practitioners, STEP, since 2007 and an active member of its Miami Branch Committee since 2010.

Ceci Hassan
STEP Miami Branch Vice-Chair
Ceci Hassan is a Partner in Baker McKenzie’s Tax Practice Group, and Global Wealth Management sub-practice group in Miami, Florida. Ms. Hassan’s practice focuses on international clients, their families, family offices, and their companies with structuring their investments inside and outside of the US, such as international trust planning, structuring US real estate holding structures with compliance with FIRPTA, investments and holdings in US and foreign companies and operating businesses, pre immigration planning for individuals and families coming to the US, expatriation planning for individuals renouncing their US citizenships or green cards, global exchange of information (FATCA, CRS), and other international tax planning matters, also with a focus on the new US tax reform. She also handles general tax planning for individuals and companies.

Patricia Carral
STEP Miami Branch Board Member and Branch Secretary
Ms. Patricia Carral has been servicing Latin America’s high net worth clients for over 15 years. Patricia is currently Vice President – Wealth Planner for Citi Private Bank. She was an integral member of HSBC’s International Private Bank, Head of Private Clients – Latin America for Amicorp in and Senior Vice President for International Wealth Protection.
She is a sought after industry expert given her experience in assisting ultra-high net worth families throughout the hemisphere with their generational wealth planning needs. Patricia, an active Trust and Estate Practitioner and a Board Member of STEP Miami Branch, has been a key participant in numerous wealth planning transactions that have involved global financial institutions, local and international accountancy and consulting firms, law practitioners and family offices. She specializes in identifying and creating the most sophisticated and suitable fiduciary solutions for the optimization of wealth preservation and transfer.
Cintia Jasminoy
STEP Miami Branch Board Member and Branch Student Liaison

Cintia Jasminoy joined UBS in July 2006. She provides Wealth Planning Services for the high net worth client segment and also manages the new business process for Wealth Planning Americas. Prior to joining UBS, Cintia worked for International Planning Group (IPG) as an Estate Planning Coordinator and worked for Citigroup Private Bank as a Trust Sales Administrator. Cintia received her Bachelor's degree in Business Administration from Universidad Católica Argentina and received an MBA with concentration in Marketing from Florida International University. She was awarded the STEP Diploma in International Trust Management with honors.

Arthur Ditcher
Step MIAMI Branch Board Member and Branch Treasurer

Art Dichter has more than 25 years of experience assisting international private clients in planning and compliance for foreign trusts, cross-border estate planning, pre-immigration planning, and US tax compliance matters. He also specializes in assisting multi-national companies with complex transactions, including inbound investments and structuring with holding companies. Dichter has been a guest lecturer at the University of Miami School of Law and is a frequent speaker at international tax and STEP conferences. He is a member of the Tax Section of the Florida Bar and has served on the International Tax Committee of the FICPA. Mr. Ditcher attended New York University School of Law, LLM in Tax; American University, Juris Doctor; and Muhlenberg College, Bachelor's degree in Accounting and Business.

Maria Toledo
STEP Miami Branch Board Member and Branch Treasurer

Maria Toledo is a Senior Manager in Kaufman Rossin’s international tax practice, where she advises domestic and foreign privately-held companies, closely-held businesses and high-net worth individuals navigate the tax compliance experience as they conduct business and acquire real estate in the U.S.

A leader of the firm’s offshore voluntary disclosure and streamlined procedures program, Maria has counseled more than 100 clients with undisclosed income from offshore accounts to minimize their tax and reduce penalties. She also provides international tax planning and structuring services to foreign clients interested in U.S. real estate. Maria helps them comply with the Foreign Investment in Real Property Tax Act (FIRPTA) and obtain withholding certificates. Maria has worked with international tax clients, including corporations, foreign nationals and expatriates, for more than a decade. When foreigners are interested in establishing businesses in the U.S., Maria works with their attorneys to obtain tax ID numbers and assists clients with pre-immigration tax planning. She also develops accounting strategies for their U.S. business plans and helps them comply with the Foreign Account Tax Compliance Act. She is a Certified Public Accountant in the state of Florida, and a member of the American Institute of Certified Public Accountants and the Florida Institute of Certified Public Accountants. Maria earned a bachelor's degree in accounting and a master's degree in tax from Florida International University.
BOARD OF DIRECTORS

Fabio Concesi
STEP Miami Branch Board Member and Branch Membership Officer

Fabio Concesi is a Director and International Wealth Strategist covering the Latin America Region. As part of Merrill Lynch’s Strategic Wealth Advisory Group, he advises global clients throughout the Latin America region with interests in estate and other wealth planning services in conjunction with their International Financial Advisors.

Fabio started his career in the Tax Advisory team for PricewaterhouseCoopers in Rio de Janeiro. He then joined Citi Wealth Management in Spain as Compliance and Legal Officer. After two years, he joined Citi Private Bank in Zurich, Switzerland as a Trust Officer. Fabio was relocated to Miami in January 2012 to join the Citi Wealth Planning team working with Ultra High Net Worth Individuals from the LatAm region. In this role Fabio was responsible for providing guidance on wealth planning matters, including: developing and implementing tailored and complex estate, gift and income tax planning, transition planning, and business succession issues. Fabio has an extensive experience in developing, delivering and implementing customized wealth plans for ultra high net worth individuals.

Fabio is an Attorney at Law (Brazil)* and holds a Post-Graduate degree in International tax law from the University of Barcelona. He is a founding member of the Society of Trust and Estate Practitioners in Brazil and is fluent in Portuguese, English and Spanish. He holds the Series 7 and 66 FINRA registrations. Education / Designations / Licenses / Memberships: Post-Graduate in International Tax – Spain; Law degree – Brazil; Attorney (Brazil); Society of Trust and Estate Practitioners, Founding Member of the Brazil Branch.

Kevin Neal
STEP Miami Branch Board Member and Technology Officer

Kevin M. Neal is the President and CEO of Moenio, LLC., a client-advocacy firm with offices in Miami and Nashville. Kevin brings over 20 years of extensive wealth management experience focused on high net worth and ultra-high net worth client issues and is a leading authority on financial advisor and private banker practices and solutions when working with clients covering suitability, advisor/firm sales practices, wealth management issues, and fiduciary requirements. Kevin’s firm focuses on helping clients recognize if they have hired the right financial advisor or banker, working with trustees and beneficiaries on gauging investment benefits and risks, and creating customized searches to find the most suitable advisor/banker for a clients needs.

Kevin is a nationally recognized authority on the investments solutions and services needed by wealthy families when working with financial advisors and wealth management firms. Kevin is a regular contributor to Bloomberg radio and has provided expert commentary in publications such as The New York Times, Barron’s – Penta, Business Insider, and others. Kevin is a Certified Financial Planner (CFP), Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC) and TEP (Trust and Estate Practitioner). As a Business Development Consultant, Mr. Neal’s role was specifically focused on evaluating the advisor’s business and sales practice to help them create better solutions for their clients and for growth.

Carlos Soto Raynal
STEP Miami Branch Board Member and Branch Mentoring Program Officer

Mr. Carlos Soto Raynal is the Director of Wealth Management Solutions, in the Miami office of EFG Capital, part of the EFG International Group headquartered in Switzerland. He is responsible for the analysis of, and assistance with, international wealth planning structures for high-net-worth clients, primarily from the Americas region.

Before joining EFG, Mr. Soto Raynal worked at local and international firms, in Mexico and the United States, such as Amicorp, KPMG, BBVA Bancomer, S.A., Ryan & Sanders LLP and Fernández, Espino y Asociados, S.C. He was also a tax law and corporate law professor at Instituto Tecnológico y de Estudios Superiores de Monterrey, Ciudad Juárez Campus.

Mr. Soto Raynal holds a Juris Doctor (JD) degree from Loyola University Chicago, School of Law; and, a law degree (LLB) in Mexico from Instituto Tecnológico y de Estudios Superiores de Monterrey, Chihuahua Campus. Mr. Soto Raynal is admitted to practice law in the State of Texas; and, is currently a member of the Board of Directors of the Society of Trust and Estate Practitioners (STEP) Miami and the Florida International Bankers Association (FIBA).
Jennifer Wionceck
STEP Miami Branch Board Member and Branch Events Officer

Jennifer J. Wioncek is a Partner in Bilzin Sumberg’s Tax & Private Wealth Services Group. Jennifer’s practice focuses on domestic and international trust and estate planning. She advises high-net-worth individuals and family offices on both domestic and international trust and estate planning matters, multijurisdictional estate administration matters, and acquisition, maintenance, and sale of U.S. real estate by foreigners.

Jennifer also handles pre-immigration planning, expatriation planning, international reporting and compliance, and offshore voluntary compliance. Jennifer is an active speaker in the community, focusing on international tax planning issues, and is an adjunct professor at the University of Miami School of Law Tax LLM program, where she teaches multiple classes in the area of trusts and estates. She is also a volunteer for the Leadership Council on Legal Diversity (LCLD) Success in Law School Mentoring Program.

Jennifer is recognized as a leading tax, trusts and estates “Power Woman” attorney by Citywealth. She is listed as one of 40 “Rising Star” South Florida attorneys under the age of 40 by the Daily Business Review, and has been consistently recognized as a “Rising Star” by Florida Super Lawyers.

Jennifer received her LL.M. from New York University, and her J.D. from St. Thomas University, graduating magna cum laude. She also earned an M.S. degree from St. Thomas University and graduated magna cum laude from St. Leo University with her B.A.

John Harris
STEP Miami Branch Board of Director and Branch Events Officer

John Harris currently serves as the Managing Director with The Coral Gables Trust Company. He has more than 28 years of wealth and investment management, trust, private banking, commercial lending and financial and estate planning experience. John's career highlights include positions as Senior Vice President, Private Banking Manager and Senior Lender with Northern Trust Bank; First Vice President and County Wide Group Manager with SunTrust Bank.

John has worked with a full array of affluent and high net worth individuals, families, foundations and institutions. He has a very value-based and collaborative approach to the business. John very much enjoys working closely with his clients and their advisors in order to make sure that everyone’s collective efforts are aligned to meet the client’s overall objectives.


His leadership roles include committee and board positions, and he was recently appointed to STEP Miami Board of Directors. John has been a regular contributor to several print and online publications, including “SunSentinel,” “Miami Herald,” and “Forbes.”
Rahul Ranadive
STEP Miami Branch Board Member and Events Officer

Rahul Ranadive has nearly 20 years of experience advising international high net-worth families on global estate and trust planning, private banking, and other personal tax matters. He advises closely held family businesses on a wide range of international and domestic tax and corporate issues. Having been raised in two cultures, Mr. Ranadive understands the difficulties faced by families spread across multiple jurisdictions as they deal with cross-border succession planning and tax minimization issues. His background helps him to develop tax plans that achieve efficiency and global tax minimization through bilateral income tax treaties, residency planning, income sourcing strategies, valuation discounts, and foreign tax credits.

Mr. Ranadive counsels nonresident individuals and foreign corporations seeking to invest and do business in the United States. His guidance helps them achieve their commercial objectives and overall tax efficiency in both the United States and their home countries. On behalf of foreign investors acquiring U.S. real estate, he crafts tailored investment structures and engages in strategic Foreign Investment in Real Property Tax Act (FIRPTA) planning pre-closing. Mr. Ranadive is experienced in pre-immigration tax planning, including for investors under various visa categories. He regularly advises foreign lenders and U.S. borrowers on the benefits of portfolio loans and provides complete counseling and drafting services for portfolio loan documentation.

He advises domestic clients on the formation of foreign operations, joint ventures, and mergers and acquisitions; analyzes the impact of local taxes and financial regulations in a given jurisdiction; and advises on the U.S. tax consequences of foreign activities, guiding negotiations where tax questions are paramount.

Mr. Ranadive attended the University of Florida (LL.M. Taxation, 1999);
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