

SESSIONS

US/UK TAX AND ESTATE PLANNING 2019 AGENDA - 07/11/2019

US/UK Tax Planning, London

7 November 2019
Millennium Knightsbridge
London, UK

Registration

09:00 - 09:30

Chairman's Opening Remarks

09:30 - 09:40

Participants

Iain Younger - Director, Frank Hirth

"Foreign" Trusts – A US & UK perspective on offshore considerations

09:40 - 10:20

Participants

Patrick Harney - Head of Private Client, Forsters

Michael Betley - Chairman, Trust Corporation International

Jay Rosenbaum - Head of International Private Clients, Nixon Peabody

Family Business – Planning for an exit and the after effects

10:20 - 11:00

Participants

Chris McLemore - Partner, Butler Snow

Frederick Bjorn - Partner, Payne Hicks Beach

Scott Barber - Partner, Buzzacotts

Advising the PE executive - Tax, Wealth Management & Succession

11:00 - 11:45

Participants

Michael Lewis, Frank Hirth

Robert Paul - Partner and Co-Head of the US Family Office, London & Capital

Richard Ward - Co-Managing Partner, Debevoise & Plimpton LLP

Refreshment Break

11:45 - 12:15

The international sportsperson & entertainer – Tax & Immigration

12:15 - 12:55

Participants

Matthew Pannell - Associate Director, Frank Hirth

Nita Upadaye - Principal, NNU Immigration

Current trends (and outlook) in wealth advisory- What is affecting the US/UK connected person

12:55 - 13:35

Participants

Nick Blogg - Investment Manager, LGT Vestra

Sarah Courtney Dockett - Private Banker, Citi

Lunch

13:35 - 14:35

Tax Enforcement – US & UK Update: what is around the corner?

14:35 - 15:15

Participants

Jonathan Burt - Partner, Harbottle & Lewis

Dianne Mehany - Partner, Caplin & Drysdale

Succession planning tools: Do trusts still offer opportunity?

15:15 - 15:55

- What are the options?
- Discussion of the alternatives e.g. FLP / FIC / Insurance

Participants

Sangna Chauhan - Partner, Charles Russell Speechlys

Sarah Farrow - Director, Frank Hirth

Grayson Dufrene - Managing Director, Vie International

Refreshment Break

15:55 - 16:25

The milestones of a marriage (through the good and the bad) – US/UK Couple

16:25 - 17:05

Participants

Sam Longworth - Partner, Stewarts

David Foster - Private Client Associate Director, Frank Hirth

Chairman's Summation

17:05 - 17:15

Participants

Iain Younger - Director, Frank Hirth

Drinks Reception

17:15 - 18:45

SCHEDULE

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