

The 6th Annual STEP Pacific Rim Conference

Cross Border Estate, Income Tax, Business and Investment Planning for High Net Worth Individuals, their Families, Businesses and Trusts featuring speakers from more than 7 jurisdictions

Friday May 3rd &
Saturday May 4th, 2013
Intercontinental Los Angeles
Century City Hotel



GT GreenbergTraurig



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STEP
Society of Trust and
Estate Practitioners **USA**

Register by April 5, 2013 and pay only \$795

(members and non-members). Rates after April 5, 2013: \$895

MCLE and CPE continuing education pending.

Who Should Attend and why?

This two-day conference will be of particular relevance to estate planners; tax advisors; professionals representing family-owned businesses, entrepreneurs and other high net worth individuals; trust company officers; and in house counsel and compliance officers at trust companies and banks.

This conference will feature speakers from 7 foreign jurisdictions and 4 U.S. jurisdictions. Headline sessions will cover use of trusts to hold an international family business and conflicts between divorce decrees and trusts. Update sessions will cover international and FACTA withholding and reporting.

There will be estate planning workshops dealing with U.S.-Australia, U.S.-Hong Kong-China, Singapore-Hong Kong, U.S.-Japan, U.S.-Mexico, and U.S.-Canada.

SPECIAL PRE-CONFERENCE SEMINAR On Fundamentals of International Estate Planning

Thursday, May 2, 2013 (2 pm - 6:30 pm) Cost: \$150

Delegates who register for the 6th Annual STEP Pacific Rim Conference may purchase up to two tickets for the pre-conference for personal use or for other members of his/her firm. Please note that registration for the pre-conference seminar is separate from the Pacific Rim Conference. Contact mehler@gtlaw.com for registration and other details related to this pre-conference seminar.

Register online at: www.regonline.com/step2013

DAY ONE
FRIDAY, MAY 3, 2013
(8:30 A.M. TO 5:30 P.M.)

Opening Remarks:

William Norman,
Conference Co-Chair and
Chair of STEP-Los Angeles

**Panel 1 - Use of Trusts (or
Other Vehicles) to Hold the
International Family Business**

(2.25 hours)

CO-CHAIRS:

William K. Norman,
California

Christopher S. Armstrong,
California

PANELISTS:

Carla J. Rojas I.,
Panama

Mark Lea,
Hong Kong

David Chong,
Singapore

Nicholas Jacob,
London

Christopher M. Reimer,
Wyoming

Break

**Panel 2 - International Tax
Enforcement Update**

(1.25 hours)

CHAIR:

Paul A. Sczudlo,
California

PANELISTS:

Bruce Zagaris,
D.C.

Brian Rowbotham,
California

Abel F. Mejia Consenza,
Mexico

**After-Lunch Speaker:
Matrimony and Trusts in
Conflict**

Nicholas Jacob,
London (.75 hours)

**Panel 3 - Dealing With Conflicts
Between Divorce Decrees (or
Forced Heirship Law) and Trusts**

CO-CHAIRS:

Lawrence H. Heller,
California

M. Katharine Davidson,
California

PANELISTS:

Stephen A. Kolodny,
California

Mark Lea,
Hong Kong

Carla J. Rojas I.,
Panama

Christopher M. Reimer,
Wyoming

Break

**Panel 4 - Cross Border PacRim
Estate Planning Workshops:
(Concurrent Session - Part 1)**

(1 hour)

A) U.S. / Australia

CHAIR:

Paul A. Sczudlo,
California

PANELISTS:

Denise Honey,
Australia

Polina S. Chapiro,
California

OR

B) U.S. / Hong Kong / China

CHAIR:

Brian Rowbotham,
California

PANELIST:

Mark Lea,
Hong Kong

**PROGRAM
COMMITTEE**

With special thanks to
Lawrence H. Heller of
Greenberg Traurig, LLP, and
William K. Norman of Ord
and Norman for producing the
2013 Pacific Rim Conference
on behalf of the West Coast
Chapters of STEP.

**About the
Organizers**

The Society of Trust and
Estate Practitioners (STEP) is
a unique professional body
providing members with a
local, national and
international learning and
business network for its
members, who are
professionals specializing in
trusts and estates,
executorship, administration
and related taxes. STEP has
over 18,000 members
worldwide, providing coverage
of over 84 countries. For
further information, visit
www.step.org for email
step@step.org



Panel 4 - Cross Border PacRim Estate Planning Workshops: (Concurrent Session - Part 2)
(1 hour)

C) Singapore / Hong Kong

CHAIR:

William K. Norman,
California

PANELISTS:

Mark Lea,
Hong Kong

David Chong,
Singapore

OR

D) U.S. / Japan

CHAIR:

Christopher S. Armstrong,
California

PANELISTS:

Akane R. Suzuki,
Washington

Tomoko Nakada,
Tokyo

Reception

**DAY TWO
SATURDAY, MAY 4, 2013 (8:30
A.M. – 1:30 P.M.)**

Panel 5 - FATCA Withholding and Reporting Update From Various Perspectives (1.5 hours)

CHAIR:

M. Katharine Davidson,
California

PANELISTS:

William K. Norman,
California

Bruce Zagaris,
D.C.

Ricardo León-Santacruz,
Monterrey

Panel 6 - Estate Planning for Individuals With Foreign Situs Assets (Concurrent Sessions)
(1 hour)

A) U.S. / Mexico

PANELISTS:

Michelle B. Graham,
California

Ricardo León-Santacruz,
Monterrey

OR

B) U.S. / Canada

PANELISTS:

Lawrence H. Heller,
California

Elaine E. Reynolds,
British Columbia

Break

Introductions of West Coast Chairs

Lawrence H. Heller,
Chair of STEP USA

Panel 7 - Case Studies in Planning for Individuals Changing Residency and/or Citizenship (1 hour)

Chair:

Lawrence H. Heller,
California

Panelists:

Elaine E. Reynolds,
British Columbia

Ricardo León-Santacruz,
Monterrey

Akane R. Suzuki,
Washington

Denise Honey,
Australia

Closing Remarks:

Lawrence H. Heller,
Conference Co-Chair and
Chair of STEP USA

MEMBERSHIP INFORMATION

STEP USA:

Jeryl Pine
Jeryl.pine@step.org

STEP Los Angeles:

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Ybhathella@deloitte.ca

SPECIAL PRE-CONFERENCE SEMINAR

Thursday, May 2, 2013

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See last page of this brochure for details.

THE DISTINGUISHED FACULTY

PROGRAM CHAIRS

Lawrence H. Heller, TEP
Greenberg Traurig, LLP
Los Angeles California

William K. Norman, TEP
Ord & Norman
Los Angeles, California

SPEAKERS/PANELISTS

Christopher S. Armstrong, TEP
Armstrong & Hastings, LLP
San Francisco, CA

Polina S. Chapiro, TEP
Green Hasson & Janks LLP
Los Angeles, CA

David Chong, TEP
Portcullis TrustNet (Singapore) Pte Ltd.
Singapore

M. Katharine Davidson, TEP
Holland & Knight
Los Angeles, California

Michelle B. Graham, TEP
McKenna Long & Aldridge LLP
Rancho Santa Fe, CA

Denise Honey
Pitcher Partners Advisors Proprietary
Limited, Australia

Nicholas Jacob, TEP
Lawrence Graham LLP
London

Stephen A. Kolodny
Kolodny & Anteau
Beverly Hills, CA

Mark Lea
Lea & White
Hong Kong

Ricardo León-Santacruz
Sanchez Devanny Eseverri S.C.
Monterrey

Abel Francisco Mejia Cosenza, TEP
Sanchez Devanny Eseverri S.C.
Mexico City

The 6th Annual STEP Pacific Rim Conference

Friday, May 3 & Saturday, May 4, 2013
Interncontinental Los Angeles Century City Hotel



Tomoko Nakada
Hokusei Law Office, P.C.
Tokyo

Christopher M. Reimer, TEP
Long Reimer Winegar Beppler LLP
Jackson, WY

Elaine E. Reynolds
Legacy Tax + Trust Lawyers
Vancouver

Carla J. Rojas I
Quijano & Associates
Panama City

Brian Rowbotham, TEP
Rowbotham & Company LLP
San Francisco, CA

Paul A. Sczudlo, TEP
Law Offices of Paul A. Sczudlo
Los Angeles, CA

Akane R. Suzuki, TEP
Garvey Schubert Barer
Seattle, WA

Vicky Wong
LGT Bank
Hong Kong

Bruce Zagaris, TEP
Berliner Corcoran & Rowe
Washington, D.C.

Accommodations

STEP has reserved a block of rooms at

***Interncontinental
Los Angeles Century
City Hotel***

allocated on a first-come, first-served basis.

Attendees may reserve directly with the hotel at (866) 329-1010.

Please make reference to STEP Pacific Rim Conference.

REGISTER ONLINE:

THE EASIEST WAY TO REGISTER FOR THIS CONFERENCE IS ONLINE: WWW.REGONLINE.COM/STEP2013

REGISTRATION METHODS

- Via Online: www.regonline.com/step2013
- Via Fax: please complete this page and fax to (310) 586-0208

Title: _____

First Name: _____

Surname: _____

Preferred name on badge: _____

Firm: _____

Circle one: Atty | Accountant | Financial Planner | Trust Officer

Postal Address: _____

Tel No: _____ Fax No: _____

Email: _____

Access/Dietary Requirements: _____

PLEASE NOTE: We may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event.

PAYMENT METHODS

By Check:

Please issue a check payable to "S.T.E.P. - L.A." and mail it to Roxann Mehle, Greenberg Traurig, 1840 Century Park East, Suite 1900, Los Angeles, CA 90067.

By Credit Card:

Type of card: Visa MasterCard Discover Diner Club AmEx

Name on card: _____

Credit Card No: _____

Card start date: _____ Expires: _____

3 digit security code: _____

Total Amount: \$ _____

Signature of card holder: _____

Date: _____

Hotel Accommodations

Preferential rates have been negotiated at Intercontinental Los Angeles Century City. These are available on a first-come first-served basis. To book, please call (866) 329-1010. Please make reference to "STEP Pacific Rim Conference".

Data Protection

STEP will use this information to update its databases, which will be used to provide details to STEP products and services. Please check the box if you would prefer STEP not to use your information in this way.

Do not use my information

REGISTRATION FEE – please check corresponding box

Early Bird US\$795 _____

This fee applies when you register and pay by April 5, 2013.

RATE AFTER APRIL 5, 2013

Regular Rate US\$895 _____

I Plan To Attend

Friday, May 3, 2013 (check one)

Panel 4A - U.S. - Australia Cross Border Planning Workshop _____

Panel 4B - U.S. - Hong Kong - China Cross Border Planning Workshop _____

Friday, May 3, 2013 (check one)

Panel 4C - Singapore - Hong Kong Cross Border Planning Workshop _____

Panel 4D - U.S. - Japan Cross Border Planning Workshop _____

Saturday, May 4, 2013 (check one)

Panel 6A - Estate Planning for Individuals with Foreign Situs Assets:
U.S. - Mexico _____

Panel 6B - Estate Planning for Individuals with Foreign Situs Assets:
U.S. - Canada _____

CANCELLATIONS/SUBSTITUTIONS

Cancellations must be received in writing by April 19, 2013 and will be subject to an administration charge of \$200. It is regretted that cancellations made after that time will not be accepted and the delegate will be liable for the full conference fee. Substitutions may be made at any time provided the organizers are notified prior to the conference. Please contact Roxann M. Mehle by email mehler@gtlaw.com with any cancellations or substitutions.

Terms and Conditions

STEP reserves the right to amend or cancel this course if the occasion necessitates. In such circumstances a full refund of any registration fee will be made but STEP shall accept no further liability. Prices may be subject to change. This booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of the fees due.

I Learned About the Conference From:

E-Mail _____ STEP Website _____

Brochure by Mail _____ Ad in Periodical _____

Other: (Explain) _____

REGISTRATION FOR PRE-CONFERENCE PROGRAM

Thursday, May 2, 2013

2:00 pm - 6:30 pm

Please RSVP to Tammy Luther at tammy.luther@hklaw.com

See next page for details.

SPECIAL PRE-CONFERENCE SEMINAR

Fundamentals of Cross-Planning for Individuals and Their Businesses

Thursday, May 2, 2013
2:00 pm - 6:30 pm

Cost: \$150

Greenberg Traurig, LLP
1840 Century Park East
Suite 1900
Los Angeles, CA
(Century City)

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Cost and registration for the pre-conference on Thursday, May 2, are separate from the main conference on Friday, Saturday, May 3 & 4.

PRE-CONFERENCE PROGRAM

Thursday, May 2, 2013
(2:00 p.m. to 6:30 p.m.)

Opening Remarks:

M. Katharine Davidson,
*Seminar Chair and Vice
Chair and Program Officer of
STEP Los Angeles*

Panel 1:

**Overview of Tax
Status Rules:
Citizenship, Domicile
and Residency**
(.5 hours)

INSTRUCTOR:

Paul A. Sczudlo,
Los Angeles

Panel 2:

**U.S. Persons With
Overseas Assets**
(.75 hours)

INSTRUCTORS:

Lawrence H. Heller,
Los Angeles

Vicky Wong,
Hong Kong



Panel 3: Foreign Persons With U.S. Assets

(1 hour)

INSTRUCTORS:

Michelle B. Graham,
San Diego

M. Katharine Davidson,
Los Angeles

Break

**Panel 4:
Foreign Trusts**
(.75 hours)

INSTRUCTORS:

William K. Norman,
Los Angeles

Vicky Wong,
Hong Kong

**Panel 5:
Cross-Border
Compliance**

(1 hour)

INSTRUCTORS:

Brian Rowbotham,
San Francisco

Polina S. Chapiro,
Los Angeles

**TO REGISTER FOR THIS
PRE-CONFERENCE**

**Please RSVP to Tammy
Luther at
tammy.luther@hklaw.com**