

A conference presented by the IBA Individual Tax and Private Client Committee and supported by the European Regional Forum



the global voice of the legal profession®

22nd Annual International Wealth Transfer Practice Conference

Seeking security in a transparent world



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6–7 March 2017, Claridge's Hotel, London, England

This world leading event regularly attracts over 150 eminent legal, business and regulatory professionals from more than 40 jurisdictions to examine the hottest issues involving international wealth transfer, private clients' taxes, estate planning and much more.

This year's topics will include:

- Hot topics or winds of change?
- Hands off those assets: cross-border strategies and vulnerabilities to protecting family wealth from civil creditors
- 'Three may keep a secret if two are dead' How the well advised international family balances transparency, privacy and openness to transfer their wealth successfully
- The new migration period; clients moving assets in a new era of anti-money laundering initiatives
- Personal security in a dangerous world
- Exchange of information in the new post-BEPS world – where do we stand and where are we going?



Headline conference sponsor



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UP TO 12.5 CPD/CLE
HOURS AVAILABLE*

Programme

Conference Co-Chairs

Olga Boltenko *Withers, Zurich; Co-Chair, IBA Individual Tax and Private Client Committee*

Daniel Simon *Collyer Bristow, London; Vice-Chair, IBA Individual Tax and Private Client Committee*

Rashad Wareh *Kozusko Harris Duncan, New York; Co-Chair, IBA Individual Tax and Private Client Committee*

Monday 6 March

0830 – 0845 **Welcome from the Conference Co-Chairs**

0845 – 0915

The first thing we do, let's kill all the lawyers

Some argue that lawyers, bankers and trustees have been neutralised and no longer defend their clients' financial interests, and that those persons or powers with any reason to attack these clients will shortly be at liberty to do so. Is it 'game over' or will a new breed of private client advisors arise phoenix-like from the ashes of their predecessors to save the day?

Comments from the floor welcome.

Moderator

Christopher Potter *SETE SA, Geneva*

0915 – 1030

Hot topics or cold winds of change?

A review of the latest developments around the world, including Brexit, new UK tax rules on offshore trusts, new amnesty programmes and more. Contributions from the floor on developments in your jurisdiction are welcome.

Moderator

Daniel Simon

Speakers

Oliver Court *Macfarlanes, London*

Eric Dorsch *Kozusko Harris Duncan, New York*

Hanneke Farrand *ENSAfrica, Cape Town*

Nora Lillis *William Fry, Dublin*

1030 – 1100 **Coffee/tea break**

1100 – 1230

Hands-off those assets: cross-border strategies and vulnerabilities to protecting family wealth from civil creditors

This panel will explore different legal techniques and structures designed to provide protection of wealth from future lawsuits. The enforceability of trusts and various entities under civil and common law will be examined from both the client and creditor perspective.

Moderators

Mark Osborne *Osborne Helman Knebel & Scott, Austin, Texas; Scholarship Officer, IBA Individual Tax and Private Client Committee*

Corina Weigl *Fasken Martineau, Toronto, Ontario*

Panellists

Michele Caratsch *Baldi & Caratsch, Zurich*

Johannes Gasser *Gasser & Partner, Lichtenstein*

Paolo Giacometti *Chiomenti, Milan*

Matt Guthrie *Mourant Ozannes, Guernsey*

1230 – 1330 **Buffet lunch**

Headline social event sponsors

**Cone
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Associate conference sponsor


PEAK TRUST COMPANY
Elevated Trust & Wealth Management Solutions

Monday continued

1330 – 1500 **Roundtable discussion**

Lawyers in practice – will your clients' problems become yours?

How do you get, keep or sometimes get rid of your clients? Join in this lively roundtable discussion about managing clients in the age of tax transparency and exchange of information. Will your clients' tax planning, legal in your jurisdiction but illegal in theirs, entangle you into a new morass? How do you disengage if need be? What are your ethical and legal obligations in your jurisdiction? What can and can you not do? And what about so-called 'aggressive tax planning'? What if your client wants to move assets from a CRS jurisdiction to the US? Can US tax lawyers be caught in the client's transaction? What does the 4th Money Laundering Directive say to this? What is a SAR and do you care? Should we ask: 'is it ethical or is it legal'? Can we afford not to care about a client's actions? Share your stories and solutions.

Moderators

Leigh-Alexandra Basha *McDermott Will & Emery, Washington DC; LPD Council Member*

Gerd D Goyvaerts *Tiberghien, Brussels; Membership Officer, IBA Individual Tax and Private Client Committee*

1500 – 1530 **Coffee/tea break**

1530 – 1700

'Three may keep a secret if two of them are dead' How the well advised international family balances transparency, privacy and openness to transfer their wealth successfully.

Secrecy used to be a means of ensuring security. It seems that now the opposite is true yet many clients do not appreciate this development – something that becomes all too clear following a death. Claims from disappointed (and unexpected) beneficiaries, unclear business succession planning, tax carelessness, hidden assets, miscommunications, misunderstandings and surprises all produce avoidable insecurity for a family and its wealth.

The session will:

- demonstrate how we can add value by avoiding these uncertainties but accommodating the need for flexibility and the idiosyncrasies of each client
- show how legal advice, tax strategy and family governance can together deliver a client's objectives while retaining privacy and avoiding surprises
- illustrate with case studies how best to manage the client who still equates secrecy with security

Moderators

Anne Guichard *SCP Ceyrac de Buhren Montes Bigot Guichard Lucas Notaires Associes, Paris; Young Lawyers' Liaison Officer, IBA Individual Tax and Private Client Committee*

Jonathan Riley *Michelmores, London*

Speakers

Kira Egorova *ALRUD Law Firm, Moscow*

Nicola Saccardo *Maisto e Associati, Milan*

Carine Tohme *Tohme Law Firm, Beirut*

Catherine Watson Coles *McInnes Cooper, Halifax, Nova Scotia; Vice-Chair, IBA Individual Tax and Private Client Committee*

1930 **Conference reception and dinner**

The Banking Hall

14 Cornhill, London, EC3V 3ND

Located in the heart of the City, the Banking Hall was designed in the 1930s and has a unique Art Deco charm. Delegates will have the opportunity to enjoy reception drinks on a mezzanine level that looks out over the Bank of England followed by dinner in the Main Hall of this the Grade II listed, former bank.

Ticket price: £125 per registered delegate

Transport will be provided



Conference reception and dinner sponsors



BELLECAPITAL



0745 – 0845 **Breakfast roundtable discussion**

The new migration period – clients moving assets in a new era of anti-money laundering initiatives

Clients are concerned about their privacy in a new era of global transparency and anti-money laundering initiatives. They fear abuse by government and don't trust the security of the automatic data exchange in light of never-ending news about data leaks and hacking. Some clients wish to move themselves or their assets to a 'safer jurisdiction'. Is there such a thing, and if so, what are the obstacles for the clients and their advisors?

Moderators

Natalie Peter *Staiger Schwald & Partner Ltd, Zurich; Publication and Newsletter Editor, IBA Individual Tax and Private Client Committee*

Max Riederer Von Paar *Rubin Winston Diercks Harris & Cooke, Washington DC*

Facilitators

Alessandro Bavila *Maisto e Associati, Milan*

Inbal Faibish Wassmer *Rosak, Zurich*

Aureliano Gonzalez-Baz *Bryan Gonzalez Vargas & Gonzalez Baz, Mexico City*

James Paladino *South Dakota Planning Company, Sioux Falls, South Dakota; Corporate Counsel Forum Liaison Officer, IBA Individual Tax and Private Client Committee*

Wim Vermeulen *Cazimir Advocaten, Brussels*

Babetta von Albertini *Withers, New York*

0900 – 0915 **Welcome from the Conference Co-Chairs**

0915 – 1045

Tour of three continents – how do they actually do it?

In this panel speakers from three continents will outline solutions to a number of typical issues which HNWI's frequently confront.

Moderators

Percy Castle *Casahierro Abogados, Lima*

Niklas Schmidt *Wolf Theiss, Vienna; Treasurer, IBA Individual Tax and Private Client Committee*

Speakers

Sebastian Guerrero *Guerrero Valle Garcés Abogados, Santiago*

Rachel Harris *Loeb & Loeb, Los Angeles, California*

Katharina Hemmen *P+P Pöllath & Partners, Frankfurt*

1045 – 1115 **Coffee/tea break**

1115 – 1245

What's keeping private clients (and bankers) awake at night in Asia?

Our panelists from Asia will highlight the latest developments in their respective region that are relevant to private clients. With speakers from Malaysia, Indonesia, India, China/Hong Kong and Singapore, the speakers will discuss topics including the Indonesia tax amnesty and its impact on the Singapore private banking industry, the Malaysia 1MDB scandal and its effect on the country and the region, the India new tax scheme, the new Chinese Charity Law, the effect of implementation of CRS in Asia and what else is keeping private clients (and private bankers) awake at night in Asia.

Moderator

Stacy Choong *Withers KhattarWong, Singapore*

Speakers

Bijal Ajinkya *Khaitan & Co, Mumbai; Committee Liaison Officer, IBA Individual Tax and Private Client Committee*

Ka Im Goh *Shearn Delamore & Co, Kuala Lumpur*

Kevin Lee *Zhong Lun Law Firm, Shanghai/Hong Kong*

Yusuf Ngantung *DDTC, Jakarta*

1245 – 1345 **Buffet lunch**

1345 – 1515

Personal security in a dangerous world

High net worth individuals live in a dangerous world. They may be exposed to attacks on their reputation or their wealth through fraud, extortion or embezzlement. They may even face the risk of kidnapping. The panellists will discuss the implication of these risks and potential measures of risk reduction.

Moderator

Gerd Kostrzewa *Heuking Kühn Lüer Wojtek, Düsseldorf*

Panellists

John Hutton *AKE International Ltd, Hereford, Herefordshire*

Nina Lüssmann *Prinz Neidhardt Engelschall, Hamburg*

Stefan Kühn *BDO AG, Zürich*

Donald Palmer *Independent Security Consultant, London*

1515 – 1530 **Coffee/tea break**

Conference breakfast sponsor



Conference luncheon sponsor



Tuesday continued

1530 – 1630

Exchange of information in the new post-BEPS world – where do we stand and where are we going?

The panel addresses some selected issues regarding exchange of information in tax matters. From FATCA to CRS, from exchange of information on request (EOIR) to automatic exchange of information (AEOI), some of issues that will be tackled as follows:

- How is the international tax framework changing in the context of AEOI?
- How are financial entities coping with all these new compliance issues?
- What happens in case of mistakes on the information provided?
- How can the taxpayer's rights be taken into account?

Finally, the tax authorities' side of the coin will be considered:

- How should the exchanged information be used?
- Can the flow of information be managed and, if so, how?

Moderators

Florentino Carreño *Cuatrecasas Gonçalves Pereira, Madrid*
Raul-Angelo Papotti *Chiomenti, Milan; Website Officer, IBA Individual Tax and Private Client Committee*

Speakers

Line-Alexa Glotin *UGGC Avocats, Paris*
Mark Leeds *Mayer Brown, New York*
Gabrielle Nater-Bass *Homburger, Zurich*
Federica Pitrone *Intesa SanPaolo, Milan*
Mark Summers *Charles Russell Speechlys, Zurich*

1630 – 1700 **Summary and open committee business meeting**

Continuing Professional Development/Continuing Legal Education

*The number of CPD/CLE hours available may vary depending on the rules applied by the members' bar association/law society on time recording criteria.

For conference delegates from jurisdictions where CPD/CLE is mandatory, the IBA will provide a Certificate of Attendance for the conference. Subject to CPD/CLE requirements, this can be used by conference delegates to obtain the relevant number of hours' accreditation.

A CPD/CLE Certificate of Attendance is available to conference delegates on request. Please ask at the IBA conference registration desk for information on how to obtain the certificate.

Exhibitors



Kindly supported by



Information

Date

6–7 March 2017

Venue

Claridge's Hotel
Brook Street
London W1K 4HR
England
Tel: +44 (0)20 7629 8860
Fax: +44 (0)20 7107 8855
Email: info@claridges.co.uk

Fees

Online registrations received:

	on or before 20 January	until 24 February
IBA member	£785	£875
IBA corporate group member*	£590	£655
Non-member**	£920	£1005
Young lawyers (under 30 years)	£590	£1005
Academics/judges (full-time)	£590	£1005
Public lawyers	£590	£1005
Corporate counsel	£705	£1005
Conference reception and dinner	£125	£125

After **24 February** registrations must be received in hard copy at the IBA office.

Hard copy registration forms and fees received:

	on or before 20 January	after 20 January
IBA member	£870	£970
IBA corporate group member*	£655	£730
Non-member**	£1020	£1120
Young lawyers (under 30 years)	£655	£1120
Academics/judges (full-time)	£655	£1120
Public lawyers	£655	£1120
Corporate counsel	£785	£1120
Conference reception and dinner	£125	£125

*The IBA Corporate Group Member is a reduced rate offered to the in-house legal department of international corporations. This rate is only applicable if your company has a corporate group membership with the IBA.

**By paying the non-member fee, we welcome you as a delegate member of the IBA for the year in which this conference is held, which entitles you to the following benefits:

- 1) Password access to certain parts of the IBA website.
- 2) Receipt of *IBA E-news* and access to online versions of *IBA Global Insight*.
- 3) The member rate for any subsequent conference registrations for this calendar year.

Language

All working sessions and conference materials will be in English.

How to register

Register online by **24 February** at www.ibanet.org/conferences/conf771.aspx and make payment by credit card to avail of the ten per cent online registration discount, or complete the attached registration form and return it to Caroline Perkins at the IBA together with your payment. You should receive emailed confirmation of your registration within five days; if you do not then please contact Caroline Perkins at caroline.perkins@int-bar.org.

If you would like to become a full or general member of the IBA, which includes membership of one committee or more – and inclusion in and access to our membership directory – we encourage you to do so now in order to register for this conference at the member rate. Full details of how to join can be found at www.ibanet.org.

A reduced rate is offered to lawyers who are over the age of 65, have been an IBA member for more than 20 years and are no longer practising law.

Full payment must be received in order to process your registration.

Fees include:

- Attendance at all working sessions
- Conference materials, including any available speakers' papers submitted to the IBA before 22 February.
- Access to the above conference working materials from the IBA website (www.ibanet.org) approximately seven days prior to the conference
- Access to mobile delegate search application
- Buffet lunch on Monday and Tuesday
- Tea and coffee during breaks
- VAT at the current rate

Please note that registrations are not transferable.

List of participants

In order for your name to appear in the list of participants, which will be distributed at the conference, your registration form must be received by **24 February** at the latest.

Mobile delegate search application

All registered delegates will receive a printed list of participants at the conference; however delegates are now also able to use the mobile delegate search. This application has been developed to aid networking by giving delegates instant access to an up-to-date list of their fellow attendees, and comes with the added benefit of a built-in messaging service. All registered delegates with an internet or Wi-Fi-enabled device will have access, using their IBA username and password. Simply visit: m.ibanet.org/conf771.

Registration confirmation

All documentation regarding your attendance at the conference can now be obtained from the IBA website. Upon receipt of your payment for the conference a confirmation email will be sent containing instructions on how to download the documents. Registration confirmation will not be distributed by post.

Photography and filming

Certain sessions and/or social functions may be photographed and/or filmed and some of this content may be used for future IBA marketing materials, member communications, products or services. Should you have any concerns with regard to this, or do not wish to be featured in any of these materials please contact the IBA Marketing Department at ibamarketing@int-bar.org.

Promotional literature

Please note that no individual or organisation may display or distribute publicity material or other printed matter during the conference, unless by prior arrangement with the IBA. Organisations and companies wishing

to discuss promotional opportunities should contact the IBA Sponsorship Department at sponsorship@int-bar.org.

Travel arrangements and visas

Participants are responsible for making their own travel arrangements. It is recommended that you check your visa requirements with your local embassy or consulate. **We are unable to dispatch visa invitation letters to support your visa application prior to receipt of your registration form and full payment of registration fees.**

Please apply for your visa in good time.

Payment of registration fees

Pounds sterling: by cheque drawn on a UK bank and in favour of the International Bar Association. Please send to: 4th Floor, 10 St Bride Street, London EC4A 4AD, United Kingdom.

OR by bank transfer to the IBA account number: 13270222 (Sort Code 56-00-03) at the National Westminster Bank, St James's & Piccadilly Branch, 208 Piccadilly, London W1A 2DG, United Kingdom or SWIFT address NWBKGB2L, IBAN GB05NWBK56000313270222. Please ensure that a copy of the bank transfer details is attached to your registration form.

Euro: by cheque or bank draft, drawn on a euro zone bank and converted at the current rate of exchange and in favour of the International Bar Association.

OR by bank transfer to the IBA bank account number 550/00/06570631 (Sort Code 56-00-03) at the National Westminster Bank, St James's & Piccadilly Branch, 208 Piccadilly, London W1A 2DG, United Kingdom or SWIFT address NWBKGB2L, IBAN GB58NWBK60721106570631. **Please ensure that a copy of the bank transfer details is attached to your registration form.**

Use the exchange rate prevailing at the time of registration.

US dollars: by cheque converted at the current rate of exchange and drawn on a US bank and in favour of the International Bar Association. Please send to: 4th Floor, 10 St Bride Street, London EC4A 4AD, United Kingdom.

OR by bank transfer to the IBA account number: 01286498 (Sort Code 56-00-03) at the National Westminster Bank, St James's & Piccadilly Branch, 208 Piccadilly, London W1A 2DG, United Kingdom. SWIFT address NWBKGB2L, IBAN GB55NWBK60730101286498. **Please ensure that a copy of the bank transfer details is attached to your registration form.**

Use the exchange rate prevailing at the time of registration.

Cancellation of registration

If cancellation is received in writing at the IBA office by **3 February 2017**, fees will be refunded less a 25 per cent administration charge. Refunds will be made minus any monies owed to the IBA.

We regret that no refunds can be made after this date. Registrations received after **3 February** will not be eligible for any refund of registration fees.

Provided you have cancelled your registration to attend an IBA conference in accordance with the terms of the 'cancellation of registration' clause included in the 'Information' section of the relevant conference programme, you must then confirm to us in writing at the IBA office as soon as possible but in no event later than one year (12 calendar months) from the date of any such conference all necessary details to enable any reimbursement owed to you to be paid. We regret that no refunds will be made after the date that is one year (12 calendar months) after the date of the relevant conference.

Credit card payments: by Visa, MasterCard or American Express.

No other cards are accepted.

PLEASE ENSURE THAT YOUR NAME AND 'CON771LONDON' APPEAR ON ANY TRANSFER OR DRAFT.

No deductions or withholdings

All fees payable to us by you in accordance with the terms contained in this 'Information' section shall be paid free and clear of all deductions or withholdings whatsoever.

If any deductions or withholdings are required by law to be made from any fees payable to us by you under the terms contained in this 'Information' section you shall pay such sum as will, after the deduction or withholding has been made, leave us with the same amount as we would have been entitled to receive in the absence of any such requirement to make a deduction or withholding.

If we obtain the benefit of any tax credit or other relief by reference to any such deductions or withholdings, then we shall repay to you such amount as, after such repayment has been made, will leave us in no worse position than we would have been had no such deductions or withholdings been required.

Conference sell-outs

The IBA places its conference in venues of a suitable size for the event; however there are times when our conferences may sell out. Should this happen, prospective delegates will be informed and a waiting list will operate. The waiting list will function on a 'first come, first served' basis, subject to receiving registered delegate cancellations. The IBA will not be liable for any travel or accommodation expenses incurred by an individual who travels to the conference without a confirmed place at the event.

Hotel accommodation

The IBA has reserved a limited number of guestrooms for the nights of 4–7 March inclusive at Claridge's Hotel at the following rates:

Single/Double occupancy: £393

The above rates are per room, per night and are exclusive of breakfast and local taxes, current VAT and service charges. Please note that an additional portorage charge of £5.00 per person, per round trip is added to the final bill and must be settled on departure.

Subject to availability, the rates quoted apply if booked by 10 February via the official accommodation agent, Judy Lane Consulting (JLC). This is a limited block of rooms so please book early as rates and availability cannot be guaranteed. To make a reservation:



Complete the 'Accommodation form' and return to JLC as soon as possible to benefit from the special IBA rate.

JLC

Tel: +44 (0) 1293 888 352

Fax: +44 (0) 870 912 2511

Email: esther@judylaneconsulting.com

All reservations will be acknowledged, by email, within 48 hours of receipt. Bookings cannot be made without a credit card number. Any subsequent amendment to your reservation must be made in writing to JLC. If you do not receive email confirmation of your reservation or amendment/cancellation, please contact JLC by telephone. Subject to availability, JLC can accept reservations up until 10 February. Thereafter, all reservations should be made direct with the hotel, quoting 'IBA Conference' as the reference.

Cancellations may be made up until **10 February** without penalty. After this time cancellation charges will apply.

Please note that in the event of any late cancellations or no-shows, rooms will be charged to the individual guest's credit card given at the time of booking.

By completing the 'Accommodation form', you enter into an agreement with the hotel regarding credit card guarantees, cancellation/no-show terms and conditions and room rates. Neither the IBA nor JLC can accept responsibility for hotel accommodation disputes between a delegate and the hotel.

As the room block is limited, availability and rates are not guaranteed.

Disabled access

Claridge's Hotel is wheelchair accessible. Please notify us if you require special assistance.

Social programme

Conference reception and dinner

The Banking Hall
14 Cornhill, London, EC3V 3ND

Ticket price: £125 per person

Transport will be provided

Social event ticket reservations cannot be guaranteed unless payment has been received before **1 March** and are subject to availability.

The organisers may at any time, with or without giving notice, in their absolute discretion and without giving any reason, cancel or postpone the conference, change its venue or any of the other published particulars, or withdraw any invitation to attend. In any case, neither the organisers nor any of their officers, employees, agents, members or representatives shall be liable for any loss, liability, damage or expense suffered or incurred by any person, nor will they return any money paid to them in connection with the conference unless they are satisfied not only that the money in question remains under their control but also that the person who paid it has been unfairly prejudiced (as to which, decision shall be in their sole and unfettered discretion and, when announced, final and conclusive).

INTERNATIONAL CONVENTION CENTRE (ICC SYDNEY)

IBA 2017 Sydney

8-13 OCTOBER

ANNUAL CONFERENCE OF THE INTERNATIONAL BAR ASSOCIATION



To register your interest:

Visit: www.ibanet.org/Form/Sydney2017.aspx

Email: ibamarketing@int-bar.org

To receive details of all advertising, exhibiting and sponsorship opportunities for the IBA Annual Conference in Sydney email andrew.webster-dunn@int-bar.org

The 2017 IBA Annual Conference will be held in Sydney, Australia's leading global city. Recognised internationally as a future-focused and innovative business centre, Sydney provides headquarters for almost 40 per cent of the top 500 Australian corporations.

What will Sydney 2017 offer you?

- Gain up-to-date knowledge of the key developments in your area of law which you can put into practice straight away
- Access to the world's best networking and business development event for lawyers – attracting over 6,000 individuals in 2016 representing over 2,700 law firms, corporations, governments and regulators from over 130 jurisdictions
- Build invaluable international connections with leading practitioners worldwide, enabling you to win more work and referrals
- Increase your profile in the international legal world
- Hear from leading international figures, including officials from the government and multilateral institutions, general counsel and experts from across all practice areas and continents
- Acquire a greater knowledge of the role of law in society
- Be part of the debate on the future of the law

OFFICIAL CORPORATE SUPPORTER



Registration form



22nd Annual International Wealth Transfer Practice Conference Seeking security in a transparent world

6–7 March 2017, Claridge's Hotel, London, England

Please read the 'Information' section before completing this form and return it together with your payment to Caroline Perkins at the address overleaf.

Personal details (Please attach your business card or write in block capitals)

Title _____ Given name _____ Family name _____

Name and country to be shown on badge (if different from above) _____

IBA membership number (if applicable) _____ Date of birth _____

Firm/company/organisation _____

Address _____

Tel _____ Fax _____

Email _____

Special dietary requirements _____

TO OBTAIN A TEN PER CENT DISCOUNT ON THE FEES BELOW,
PLEASE REGISTER BY **24 FEBRUARY** ONLINE AT **WWW.IBANET.ORG/CONFERENCES/CONF771ASPX**
IBA MEMBERS CAN REGISTER ONLINE BY **20 JANUARY** FOR **£785**
PLEASE SEE 'INFORMATION' FOR FURTHER ONLINE REGISTRATION DETAILS.

Hard copy registration forms and fees received:	on or before 20 January	after 20 January	amount payable
IBA member	£870	£970	£
IBA corporate group member*	£655	£730	£
Non-member**	£1020	£1120	£
Young lawyers (under 30 years)	£655	£1120	£
Academics/judges (full-time)	£655	£1120	£
Public lawyers	£655	£1120	£
Corporate counsel	£785	£1120	£

Social functions

Conference reception and dinner, Monday 6 March, 1900

I will attend £125 I will not attend £

Breakfast roundtable, Tuesday 7 March, 0745

I will attend (no charge) I will not attend NIL

The breakfast roundtable is a working session and guests are not permitted to attend.

Social function ticket reservations are subject to availability and cannot be guaranteed unless payment has been received before **1 March**.

TOTAL AMOUNT PAYABLE £



A REDUCED RATE IS OFFERED TO LAWYERS WHO ARE OVER THE AGE OF 65, HAVE BEEN AN IBA MEMBER FOR MORE THAN 20 YEARS AND ARE NO LONGER PRACTISING LAW. PLEASE CONTACT THE IBA OFFICE FOR FURTHER INFORMATION.
*THE IBA CORPORATE GROUP MEMBER IS A REDUCED RATE OFFERED TO THE IN-HOUSE LEGAL DEPARTMENT OF INTERNATIONAL CORPORATIONS. THIS RATE IS ONLY APPLICABLE IF YOUR COMPANY HAS A CORPORATE GROUP MEMBERSHIP WITH THE IBA.
**JOIN THE IBA TODAY AND REGISTER FOR THIS CONFERENCE AT THE IBA MEMBER RATE.
PLEASE FIND THE MEMBERSHIP APPLICATION FORM AT **WWW.IBANET.ORG**.

FULL PAYMENT MUST BE RECEIVED IN ORDER TO PROCESS YOUR REGISTRATION.
PLEASE NOTE THAT REGISTRATIONS ARE NOT TRANSFERABLE.

Payment details

- I enclose a cheque/bank draft made payable to the IBA for the total amount payable.
- I have transferred to the IBA bank account the total amount payable and have attached a copy of the bank transfer details.
- Please charge the total amount due to my (delete as appropriate) Visa/MasterCard/American Express. *Other cards are not accepted.*

Card number _____ Start date _____ Expiry date _____

Name of cardholder _____

Signature _____ Date _____

Where did you first hear about this conference?

- IBA CONFERENCE OTHER CONFERENCE DIRECT MAIL INTERNET ADVERTISEMENT
- EMAIL EDITORIAL RECOMMENDATION OTHER

Please provide further details, quoting code (if applicable)

IBA listings are provided to relevant third parties for marketing purposes. The IBA will treat your personal information with the utmost respect and in accordance with UK data privacy laws.

If you are agreeable to passing on your details, please tick this box

If you do **not** wish to receive IBA information and materials, please tick this box

Your details will however be included in the list of participants.

Please send the completed form to:

International Bar Association

Caroline Perkins

4th Floor, 10 St Bride Street, London EC4A 4AD, United Kingdom

Tel: +44 (0)20 7842 0090 Fax: +44 (0)20 7842 0091

Email: caroline.perkins@int-bar.org www.ibanet.org

For office use only Payment _____ Banked _____ Processed _____

Accommodation form



22nd Annual International Wealth Transfer Practice Conference

Seeking security in a transparent world

6–7 March 2017, Claridge's Hotel, London, England

Please refer to the 'Hotel accommodation' section before completing this form

RETURN TO: **JLC** TEL: +44 (0) 1293 888 352 FAX: +44 (0) 870 912 2511 EMAIL: ESTHER@JUDYLANECONSULTING.COM.
SUBJECT TO AVAILABILITY, JLC CAN ACCEPT RESERVATIONS UP UNTIL **10 FEBRUARY**.
THEREAFTER, PLEASE CONTACT THE HOTEL DIRECT, QUOTING 'IBA CONFERENCE' AS THE REFERENCE.

Personal details *(Please attach your business card or write in block capitals)*

Title _____ Given name _____ Family name _____

Firm/company/organisation _____

Address _____

Tel _____ Fax _____

Email _____

(Please print clearly as your reservation will be confirmed by email. If you do not receive confirmation of your reservation, please contact JLC by telephone.)

Accommodation requirements

Arrival date _____ Departure date _____

Single/double room: £393 per room, per night Smoking (limited availability) Non-smoking

THE RATE EXCLUDES BREAKFAST, SERVICE CHARGES AND ALL LOCAL TAXES.
ANY RESERVATIONS MADE AFTER **10 FEBRUARY** WILL BE SUBJECT TO AVAILABILITY AND CANNOT BE GUARANTEED
AT THE ABOVE RATES. AS THE ROOM BLOCK IS LIMITED AND AVAILABILITY IS NOT GUARANTEED.

Any special requirements _____

(We will do our best to accommodate these requests but cannot make any guarantees.)

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International Bar Association

the global voice of the legal profession

The **International Bar Association** (IBA), established in 1947, is the world's leading organisation of international legal practitioners, bar associations and law societies. The IBA influences the development of international law reform and shapes the future of the legal profession throughout the world. It has a membership of more than 55,000 individual lawyers and over 206 bar associations and law societies spanning all continents. It has considerable expertise in providing assistance to the global legal community.

Grouped into two divisions – the **Legal Practice Division** and the **Public and Professional Interest Division** – the IBA covers all practice areas and professional interests, providing members with access to leading experts and up-to-date information. Through the various committees of the divisions, the IBA enables and interchange of information and views among its members as to laws, practices and professional responsibilities relating to the practice of law around the globe. Additionally, the IBA's world-class conferences provide unrivalled professional development a network building opportunities for international legal practitioners, senior business professionals, regulators and government officials.

Individual Tax and Private Client Committee overview

The individual tax and private client committee includes practitioners from a broad range of civil and common-law jurisdictions. The panels and the annual specialist conference organised by the committee focus on international planning and comparative law issues relevant to any practitioner involved in private client work. The issues regularly debated include:

- Individual tax in cross-border contexts, including the taxation of investment income, investment or other structures including trusts, and inheritance and estate tax;
- The use of trusts as planning and protection tools, conflicts of laws;
- International successions, wills, probate;
- Asset protection/investment structures in common-law and civil law jurisdictions.

Family Law Committee overview

The Family Law Committee provides a unique forum for members from different countries and different legal systems to exchange views, meet during conferences and debate issues concerning the substantive and procedural aspects of family law. The work of the committee has focused on developments of international significance, involving all aspects of family law, for example, marriage, divorce, inheritance, human rights in the family, adoption, international child abduction, etc. There is a close interaction within the committee and its members through newsletters and via e-mail.

European Regional Forum overview

The European Regional Forum was established in 1989 to provide a focus originally on the work undertaken by the IBA in developing the practice under changing legal systems of lawyers in Eastern and Central Europe. The forum was also intended to act as a channel for IBA communication with the bar associations of these local lawyers.

Contact information

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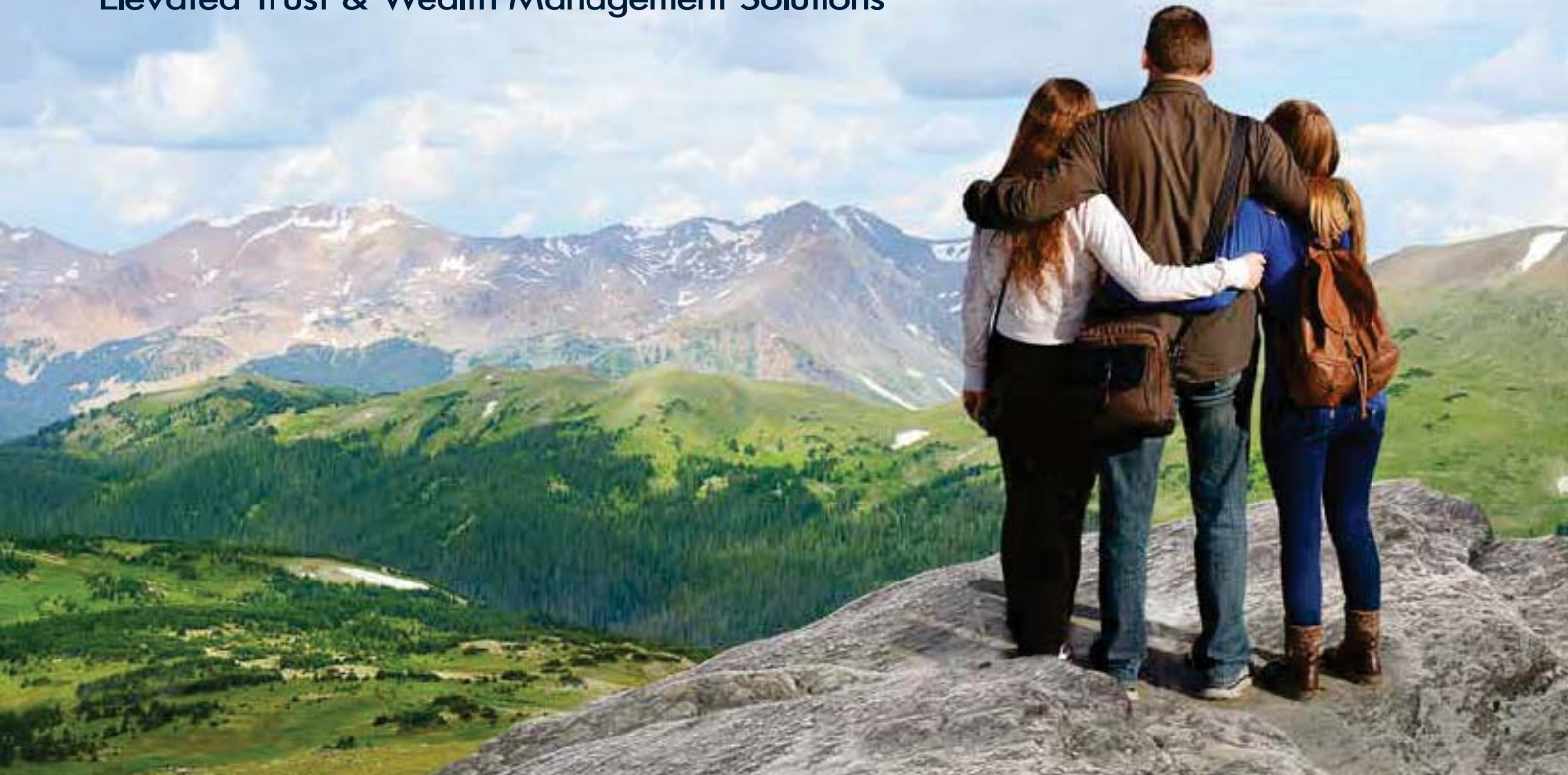
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