



International Wealth Planning Forum

For Professional Advisors

National boundaries no longer contain our clients ... or their investments. The International Wealth Planning Forum cordially invites all advisors in Estate, Business, Tax and Wealth Planning to our first annual event. Through collegiality and collaboration, we can provide the certainty and leadership our clients are seeking to offer them clarity and direction to their planning needs.

The format of the International Wealth Planning Forum is designed to engage all participants in an informal team-teaching setting, where dialogue and audience interaction is as important as what is communicated from the front of the room. The presenters are each experts in their field who enjoy teaching and who give of themselves and their time. Their unique skills, experience, expertise, and judgment are truly invaluable when blended with the incredible breath and depth of talents and experience of the attendees.

Keynote Speaker

Max Riederer von Paar, Esq.

Moderators

Joseph J. Strazzeri, Esq. and Lori Adasiewicz, Esq.

Date

Saturday, May 9, 2009

Participation Fee

\$225

Program Location & Accommodations

Hyatt Regency San Francisco Airport
1333 Bayshore Highway, Burlingame, California 94010
Phone: 650.347.1234
Toll-free: 888.591.1234
Room Rate: \$119, *please call the hotel directly to make reservations*

To Attend

Please RSVP to Bay Laurel Law Group at 650.525.0234 or email: iwpcf@baylaurellaw.com
For more info, please visit www.baylaurellaw.com/iwpcf.htm.



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AGENDA

Saturday, May 9, 2009

8:30-9:00 **Registration & Continental Breakfast**

9:00-9:30 **Collaborative Wealth Planning**

[Joseph J. Strazzeri, Esq.] Why is it especially important to assemble a collaborative team of professionals when serving the international and non-citizen client market? What are the challenges of working collaboratively? Joe will provide tools and language for facilitating a client-centered team.

9:30-10:40 **Income Taxation of the Immigrating Client**

[Claudia Howe, CPA and Brent Bergan, CPA] Clients coming in to the United States and leaving the country may be taxed differently; how to determine “residency” for income tax purposes, what income is subject to tax, what deductions and credits are available; pre-immigration planning and traps for the unwary.

10:40-11:00 **Break**

11:00-12:30 **Federal Transfer Taxation of the International Client**

[Max Riederer von Paar, Esq. and Lori Adasiewicz, Esq.] How to determine “domicile” for transfer tax purposes; the effect of tax treaties; conflict of laws and how to address this in the planning process; how to identify assets that are subject to United States transfer tax and the rules for their taxation.

12:30-1:00 **Lunch (Sponsored by HSBC Bank & HSBC Private Bank)**

1:00-1:30 **Credit & Banking Issues Faced by International Clients and their Businesses**

[William Criss and Kimberly Rumsey] Clients coming in to the United States, or leaving to reside in another country, face a variety of banking and credit issues that may prevent or delay their achieving financial objectives; what can be done to prevent problems and create fabulous results.

1:30-3:00 **Wealth Planning Strategies for the International Client**

[Max Riederer von Paar, Esq. and Lori Adasiewicz, Esq.] Planning ideas for the non-citizen couple or client, including the Qualified Domestic Trust and alternatives; deductions and credits available to the international client; how to handle foreign beneficiaries; pre-immigration planning and traps for the unwary.

3:00-3:20 **Break**

3:20-4:00 **California-Specific Estate and Family Planning Issues**

[Janet Brewer, Esq.] How to choose a guardian for minor children when your closest relatives are overseas; choice of trustee; community property issues for international clients; conflict of laws and the use of situs wills.

4:00-4:45 **Attracting & Working with the International Client**

[Joseph J. Strazzeri, Esq.] How to create clarity of message in serving your target market; distinguish your capabilities; set priorities in marketing and serve this niche for fun and for profit.

4:45-5:00 **Closing Remarks**