



UP TO 12.5  
CPD/CLE  
HOURS  
AVAILABLE\*

# 19th Annual International Wealth Transfer Practice Conference

**'Death and taxes: more than ever the only certainties'**  
*Essential update for all advisors to private clients in a changing world*

3–4 March 2014

Claridge's Hotel, London, England

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

## Topics include:

- A smorgasbord of cold truth and hot topics
- How to hold your home away from home: real estate holding structures adapted to these challenging times
- Brussels IV – on the advantages of dying abroad
- Planning for the Muslim client: keys to understanding your client
- Legal help, the lawyer is in... bring your cases for worldwide diagnosis
- 'His mother was an earwig, his father was a whale': planning for the modern family
- 'See you... out of court': dispute resolution – mediation and arbitration
- The past, present, and future relationship of onshore and offshore jurisdictions (a two-part session)

## Who should attend?

Lawyers, solicitors, notaries, trust officers, family officers, accountants, private bankers and other professionals involved in advising private clients.



# Programme

## Conference Co-Chairs

**Leigh-Alexandra Basha** *Holland & Knight, McLean, Virginia*

**Gerd Kostrzewa** *Heuking Kühn Lüer Wojtek, Düsseldorf; Senior Vice-Chair, IBA Individual Tax and Private Client Committee*

**Christopher Potter** *Sete, Geneva*

## Continuing Professional Development /Continuing Legal Education

For delegates from countries where CPD/CLE is mandatory, the International Bar Association will be pleased to provide a Conference Certificate of Attendance which, subject to the exact CPD/CLE requirements, may be used to obtain the equivalent accreditation in your jurisdiction.

This conference has been accredited for CPD/CLE by the Solicitors Regulation Authority of England and Wales. New York and Californian attorneys may submit their certificates of attendance issued, and apply this credit earned to their New York and Californian CLE requirement. Delegates should ask staff at the registration desk for information as to how to obtain the hours.

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).

## Monday 3 March

0800 – 1730 **Registration**

0830 – 0845 **Welcome from the Chairs**

0845 – 1015

### A smorgasbord of cold truth and hot topics

This session will provide an overview of the latest changes relevant to individual clients from select jurisdictions around the globe. There will also be opportunities for you to raise topical issues from your jurisdiction.

*Session Chair*

**Gerd Kostrzewa**

*Speakers*

**Jonathan Conder** *Macfarlanes, London*

**Agnès de l'Estoile-Campi** *CMS Bureau Francis Lefebvre, Paris; Website Officer, IBA Taxes Committee*

**Pedro Fernández** *Garrigues, Malaga*

**Gerd D Goyvaerts** *Tiberghien, Brussels; Publication and Newsletter Editor, IBA Individual Tax and Private Client-Committee*

**Natalie Tarolli Schmidt** *VISCHER AG, Zurich*

1015 – 1045 **Coffee/tea break**

1045 – 1215

### How to hold your home away from home: real estate holding structures adapted to these challenging times

An ideal real estate investment structure is always multi-faceted as it seeks to meet the investor's particular requirements in terms of confidentiality, estate planning, tax optimisation, etc... it has always been hard to identify the perfect structure ... and today's changing legal and tax environment does nothing to simplify the task. Our panellists will address the present, and future, of real estate holding structures.

*Session Chair*

**Jerome Assouline** *Sekri Valentin Zerrouk – SVZ, Paris; Scholarship Officer, IBA Individual Tax and Private Client Committee*

*Speakers*

**José Blasi Navés** *Monereo Meyer Marinell-lo Abogados, Barcelona*

**Lisa-Jane Dupernex** *Speechly Bircham, London*

**Natalie Peter** *Staiger Schwald & Partner AG, Zurich*

**Megan R Worrell** *Duane Morris, New York*

1215 – 1330 **Buffet lunch**

Associate Conference Sponsor



**Northern Trust**

Associate social event sponsor

 **HEUKING KÜHN LÜER WOJTEK**

1330 – 1500

### Brussels IV – on the advantages of dying abroad

'The [European] Union has set itself the objective of maintaining and developing an area of freedom, security and justice in which the free movement of persons is ensured.' This is the plain wording of the first whereas to the UE Regulation on cross-border successions (so-called 'Brussels IV'), in which the European Parliament and the Council have tried to provide for a number of measures aimed at harmonising the conflict-of-laws rules of the different Member States. How have they succeeded in these ambitious objectives? This panel will also consider whether and how third countries will be affected by this new regulation, both in the case of EU states that have not opted in (such as the United Kingdom) or non-EU states (such as Switzerland).

*Session Chair*

**Raul-Angelo Papotti** *Chiomenti Studio Legale, Milan; Committee Liaison Officer, IBA Individual Tax and Private Client Committee*

*Speakers*

**Olivier Dauchez** *Gide Loyrette Nouel, Paris*

**Richard Frimston** *Russell-Cooke, London*

**Nathalie Idsinga** *Loyens & Loeff, Amsterdam*

**Manuel Liatowitsch** *Schellenberg Wittmer Ltd, Zurich*

**Andreas Richter** *Pöllath & Partners, Berlin*

1500 – 1530 **Coffee/tea break**

1530 – 1700

### Planning for the Muslim client: keys to understanding your client

What must private client attorneys understand to effectively represent Muslim clients? Panellists will review core Islamic principles and discuss their experiences incorporating those principles into Muslim clients' inheritance planning and governance structures.

*Session Chair*

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

*Speakers*

**Shamim Adam** *1788 Capital Trust SA, Geneva*

**Ummahani Ahmed Amin** *The Metropolitan Law, Abuja*

**Rupert Ticehurst** *Berwin Leighton Paisner, London*

**Philip van Hilten** *No More Worries, Amsterdam*

1930 **Conference reception and dinner**

The Law Society – Reading Room and Common Room  
113 Chancery Lane, London WC2A 1PL

The Law Society is an integral player in the city of London's history and the magnificent building has been at the centre of the legal world since its completion in 1832. The stunning grade II listed building is the perfect setting for our gala dinner.

*Keynote speaker*

**David Trick (former England rugby player)**

'Tricky' gives a light hearted look at the world of sport and its many characters.

Ticket price: £90

Transport will be provided. More information will be issued on the tickets.



Conference reception and  
dinner sponsor

**17  
CAPITAL 88 TRUST**

Exhibitor



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0730 – 1700 **Registration**

0745 – 0845

## **Panel: Breakfast roundtable discussion Legal help, the lawyer is in... bring your cases for worldwide diagnosis**

A unique opportunity to get expert advice from your international peers on any subject that concerns you or, more specifically, your clients. Come prepared to present a case study, ask questions and answer those of others or just to listen and enjoy breakfast.

*Facilitators*

**Kwong Wing Leon** *KhattarWong, Singapore*

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

**Daniel Simon** *Collyer Bristow, London; Secretary, IBA Individual Tax and Private Client Committee*

**Debra Simon** *DMSimon CPA, Hackensack, New Jersey*

*Speakers*

All attendees!

0845 – 0900 **Coffee/tea break**

0900 – 0915 **Welcome from the Chair**

0915 – 1045

## **'His mother was an earwig, his father was a whale': Planning for the modern family (co-sponsored by the IBA Family Law Committee)**

This session will analyse a multi-generational business family, the composition of which will allow panellists to comment on issues around blended, common-law, same-sex, and multi-jurisdictional families. Panellists will address the planning measures that should be taken with respect to the business interests in light of the complex family structure. We will address corporate planning, succession planning, and estate planning, with a focus on protecting the business from the issues that may arise should any of these modern family structures go awry.

*Session Chairs*

**Gillian Rivers** *Penningtons, London; Chair, IBA Family Law Committee*

**Catherine Watson** *McInnes Cooper, Halifax, Nova Scotia; Treasurer, IBA Individual Tax and Private Client Committee*

*Speakers*

**Chawkat Houalla** *Adib & Houalla Law Office, Tripoli; Senior Vice-Chair, IBA Family Law Committee*

**Chris Owen** *Manches, London*

**Von Sanborn** *Withers Worldwide, New York*

**Markus Zwicky** *Zwicky Windlin & Partner, Zug, Switzerland*

1045 – 1100 **Coffee/tea break**

1100 – 1230

## **'See you... out of court': dispute resolution – mediation and arbitration**

The internationalisation of trust and inheritance law practice affects the planning and control of succession as it creates new cross-border issues, potential estate planning pitfalls and undesirable possibilities to attack trusts and other structures. Trusts have in particular come under attack by 'outsiders' to the trust, such as forced-heirship heirs, former spouses or creditors of the settlor. It is thus not surprising that trust litigation and inheritance disputes have increased substantially during the last years with the result that the family's dirty linen often risks to be washed in public.

This session will focus on:

- Attacks on trusts and other structures, including forced heirship claims against trustees and/or foundations.
- Alternative dispute resolution: arbitration or mediation as dispute resolution mechanism under last wills or for family disputes?
- Trust arbitration as an alternative?

*Session Chair*

**Tina Wüstemann** *Bär & Karrer, Zurich; Chair, International Children's Issues Subcommittee, IBA Family Law Committee*

*Speakers*

**Edward Buckland** *Barclays, Jersey*

**Johannes Gasser** *Batliner Gasser, Vaduz, Liechtenstein*

**Narinder K Hargun** *Conyers Dill & Pearman, Bermuda*

**Teresa Rosen Peacocke** *3 Stone Buildings, London*

**Jonathan Speck** *Mourant Ozannes, Jersey*

1230 – 1400 **Lunch**

1400 – 1630

## **The past, present and future relationship of onshore and offshore jurisdictions (a two-part session)**

As the 'tax haven' becomes a relic of the past and full disclosure becomes a new pillar of modern multijurisdictional wealth planning, offshore service providers and onshore professionals are re-examining their relationships and opportunities for the next generation.

**PART I** – will include panellists from various onshore jurisdictions discussing the current and future role of offshore jurisdictions in cross-border planning.

*Session Chair*

**Mark Osborne** *Osborne Helman Knebel & Deleeny, Austin, Texas; Publication and Newsletter Editor, IBA Individual Tax and Private Client Committee*

*Speakers*

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

**Maurizio Bravo Fortoul** *Turanzas Bravo y Ambrosi SC, Mexico City*

**Richard Hay** *Stikeman Elliott, London*

**Nicola Saccardo** *Maisto e Associati, Milan*

1500 – 1530 **Coffee/tea break**

**PART II** – will include panellists from selected offshore jurisdictions to comment on the on-going reincarnation of the offshore industry and how they are balancing new compliance burdens with the continuing expectation of privacy.

*Session Chair*

**Mark Osborne**

*Speakers*

**Helene Lewis** *Simonette Lewis, British Virgin Islands*

**Ernst Walch** *Walch & Schurti, Vaduz, Liechtenstein*

**Shan Warnock-Smith** *5 Stone Buildings, London / ICT Chambers, Cayman Islands*

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

All delegates are invited to join the committee business meeting to discuss the planning of next year's London conference and other activities of the Individual Tax and Private Client Committee with the Committee officers.

# Information

## Date

3–4 March 2014

## 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](mailto:info@claridges.co.uk)

## Fees

*Online registrations received:*

	on or before 17 January	until 24 February
IBA member	£785	£875
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	£90	£90

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

*Hard copy registration forms and fees received:*

	on or before 17 January	after 17 January
IBA member	£870	£970
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	£90	£90

\* 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) Pay the member rate for any subsequent conference registrations for this calendar year.
- 4) Take advantage of IBA Special Offers.

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](http://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.**

## Language

All working sessions and conference materials will be in English.

## How to register

Register online by **24 February** at [www.ibanet.org/conferences/conf530.aspx](http://www.ibanet.org/conferences/conf530.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 Helen Bakal 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 Helen Bakal at [helen.bakal@int-bar.org](mailto:helen.bakal@int-bar.org).

## Fees include:

- Attendance at all working sessions
- Conference materials, including any available speakers' papers submitted to the IBA before 24 February.
- Access to the above conference working materials from the IBA website ([www.ibanet.org](http://www.ibanet.org)) approximately seven days prior to the conference
- Lunch on 3 and 4 March
- Tea and coffee during breaks
- UK VAT which is currently charged at 20 per cent

## Please note that registrations are not transferable.

Guests must not be a member of the legal profession and are not permitted to attend working sessions. Checks are made to ensure members of the legal profession are not registered as guests, if this is the case, registration will be refused unless the guest registers as a full delegate for the conference. Only registered guests are eligible to participate in the social programme.

## 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/conf530](http://m.ibanet.org/conf530)

## 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.

## 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 Sponsorship department at the IBA ([sponsorship@int-bar.org](mailto:sponsorship@int-bar.org)).



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## 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.**

**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.**

**Credit card payments:** by Visa, MasterCard or American Express. No other cards are accepted.

**PLEASE ENSURE THAT YOUR NAME AND 'CON530LONDON' 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 waitlist will operate. The waitlist 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.

## Cancellation of registration

If cancellation is received in writing at the IBA office by **3 February**, fees will be refunded less a 25 per cent administration charge. We regret that no refunds can be made after this date.

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.

## 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.**

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## Hotel accommodation

The IBA has reserved a limited number of guestrooms for the nights of 2–3 March inclusive at the Claridge's Hotel at the following rate:

Superior Queen room	single / double occupancy	£325
Superior King room	single / double occupancy	£375

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

Subject to availability, the rates quoted apply if booked by **14 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](mailto: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 **14 February**. Thereafter, all reservations should be made direct with the hotel, quoting 'IBA Conference' as the reference.

Individuals may cancel prior to **14 February** without penalty. After this date cancellation charges will apply.

Please note that in the event of any 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.

## Disabled access

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

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## Social programme

### Monday 3 March

1930 Conference reception and dinner

The Law Society – Reading Room and Common Room

£90

Transport will be provided. More information will be issued on the tickets.

Social event ticket reservations cannot be guaranteed unless payment has been received before **24 February**, subject to availability.

# Registration form



## IBA 19th Annual International Wealth Transfer Practice Conference:

Death and Taxes: More than ever the only certainties.

Essential update for all advisors to private clients in a changing world

3–4 March 2014, Claridge's Hotel, London, England

Please read the 'Information' section before completing this form and return it together with your payment to Helen Bakal 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 \_\_\_\_\_

Guest name \_\_\_\_\_

Only applicable if buying more than one dinner ticket. Guests are not entitled to attend the working sessions. No member of the legal profession may be registered as a guest.

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/CONF530.ASPX**  
IBA MEMBERS CAN REGISTER ONLINE BY **17 JANUARY** FOR **£785**  
PLEASE SEE 'INFORMATION' FOR FURTHER ONLINE REGISTRATION DETAILS.

Hard copy registration forms and fees received:	on or before 17 January	after 17 January	amount payable
IBA member	£870	£970	£
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 function

Monday 3 March Conference reception and dinner Number of tickets \_\_\_\_\_ @ £90 £

One dinner ticket for each delegate and registered guest is permitted.

Social function ticket reservations are subject to availability and cannot be guaranteed unless payment has been received before **24 February**.

### Breakfast roundtable discussion – Tuesday 4 March 0745 – 0845

I will attend the breakfast roundtable discussion 'Legal help, the lawyer is in... bring your cases for worldwide diagnosis'

I will not attend the breakfast roundtable discussion

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.

\*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?**

- |   |   |   |                                   |  |
|---|---|---|-----------------------------------|--|
| <input type="checkbox"/> IBA CONFERENCE | <input type="checkbox"/> OTHER CONFERENCE | <input type="checkbox"/> DIRECT MAIL    | <input type="checkbox"/> INTERNET | <input type="checkbox"/> ADVERTISEMENT |
| <input type="checkbox"/> EMAIL          | <input type="checkbox"/> EDITORIAL        | <input type="checkbox"/> RECOMMENDATION | <input type="checkbox"/> OTHER    |  |

*Please provide further details, quoting code (if applicable)*

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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**

**Helen Bakal**

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

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

Email: [helen.bakal@int-bar.org](mailto:helen.bakal@int-bar.org) [www.ibanet.org](http://www.ibanet.org)

**For office use only** Payment \_\_\_\_\_ Banked \_\_\_\_\_ Processed \_\_\_\_\_



# Accommodation form



**IBA 19th Annual International Wealth Transfer Practice Conference:**  
Death and Taxes: More than ever the only certainties.  
Essential update for all advisors to private clients in a changing world  
3–4 March 2014, 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 **14 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 \_\_\_\_\_

Superior Queen room – single / double occupancy £325 per room per night

Superior King room – single / double occupancy £375 per room per night

THE RATE ABOVE IS EXCLUSIVE OF BREAKFAST AND LOCAL TAXES AND SERVICE CHARGES. PLEASE NOTE THAT AN ADDITIONAL PORTERAGE CHARGE OF £5.00 PER PERSON, PER ROUND TRIP IS ADDED TO THE FINAL BILL, AND WILL BE SETTLED BY THE INDIVIDUAL ON DEPARTURE.

Any special requirements \_\_\_\_\_

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

SUBJECT TO AVAILABILITY, JLC CAN ACCEPT RESERVATIONS UP UNTIL **14 FEBRUARY**.  
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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 over 50,000 individual lawyers and 205 bar associations and law societies spanning all continents. It has considerable expertise in providing assistance to the global legal community as well as being a source of distinguished legal commentators for international news outlets.

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 an interchange of information and views among its members as to laws, practices and professional responsibilities relating to the practice of business law around the globe. Additionally, the IBA's high-quality publications and world-class conferences provide unrivalled professional development and network-building opportunities for international legal practitioners and professional associates.

### **Individual Tax and Private Client Committee overview**

The committee is concerned not only with what the law is but how it might develop in:

- Inheritance rights and succession rules
- Will making
- Lifetime giving
- Trusts
- Creditor claims against trusts and estates
- Regulatory compliance affecting trusts, including the tracing of proceeds of crime
- Charities, foundations and not-for-profit organisations
- Taxation of capital transfers and income; tax treaties
- Property rights of spouses and co-habitees
- Conflict of law rules

These matters are studied not only in the context of a sole jurisdiction but also with cross-border and multi-jurisdictional implications.

Members of the committee enjoy the following benefits:

- Enhanced knowledge of one's own jurisdiction
- Greatly enhanced expertise in solving problematic cross-border and multijurisdictional client issues
- Unrivalled global networking possibilities and access to leading experts worldwide
- A valuable tool for all trust and estate practitioners and an indispensable tool for international practitioners

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.

The committee regularly organises joint sessions with its sister committee (Taxes) within the Taxation Section of the IBA, and with other related committees in other sections of the IBA.

Additionally, the Individual Tax and Private Client Committee works with the Taxes Committee to form the Taxation Section.

### **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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Tel: +44 (0)20 7842 0090 Fax: +44 (0)20 7842 0091 Email: [member@int-bar.org](mailto:member@int-bar.org) [www.ibanet.org](http://www.ibanet.org)

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