

A conference presented by the IBA Private Client Tax Committee and supported by the IBA Family Law Committee.



the global voice of the legal profession®

28th Annual International Private Client Conference: new realities in the private client practice



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5–7 March 2023

Claridge's, London, England

Headline conference sponsor



Topics include:

- Philanthropy – trends in gifting: who gives, when and why
- Keynote address: mental health for lawyers
- Asset protection in the new world
- Hot topic roundtables
- Structuring in the Middle East
- Recruiting, retaining and developing the next generation of private client lawyers
- Fifty ways to make a family: surviving and thriving in the task of advising the modern family
- Responsibilities of advisors: tales of the unexpected
- Family office: a must-have or mixed bag
- Onshore–midshore–offshore: changing tides



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20 JANUARY 2023
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FOR MORE INFORMATION AND TO BOOK ONLINE VISIT
WWW.IBANET.ORG/CONFERENCE-DETAILS/CONF2298

Programme

Conference Co-Chairs

Mark E Osborne *Osborne Helman Scott Knisely & Stanton, Austin, Texas; Co-Chair, IBA Private Client Tax Committee*

Anne Guichard *N3T Notaires, Paris; Co-Chair, IBA Private Client Tax Committee*

Jérôme Assouline *Cabinet Sekri Valentin Zerrouk, Paris; Advisory Board, IBA Private Client Tax Committee*

Sunday 5 March

1800 – 1930 **Hosted welcome reception**
Phillips Auction House
30 Berkeley Square, Mayfair, London W1J 6EX

Conference reception kindly provided by Phillips Auction House.

This reception, which will welcome all delegates to the Conference, will also be an opportunity to view some of their current works.

All registered delegates are welcome to attend.

Monday 6 March

0800 – 1700 **Registration**

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

0915 – 1015

Trends in philanthropy: who gives when and why

This presentation will review global trends in philanthropy, comparing the methods and incentives for giving worldwide. Expert panellists will compare and contrast themes and core questions, including:

- What is the demographic profile of a philanthropist?
- What motivates philanthropists?
- How is philanthropy structured?
- By giving tax breaks, are states incentivising philanthropists to pursue their own agenda?

Moderator

Sangna Chauhan *Charles Russell Speechlys, London*

Speakers

Alma Banuelos *City National Bank, Los Angeles, California*

Hanneke Farrand *Farrand Global, Douglas, Isle of Man*

Gina Pereira *Meritus Trust, Bermuda*

1015 – 1045 **Coffee/tea break**

1045 – 1130

Keynote address: mental health for lawyers

Speaker

Richard Martin *Byrne Dean, London*

1130 – 1245

What can I do with my assets in this new abnormal world?

As a result of major crises such as the US–China commercial battle, continuing economic effects of Covid-19, run-away causes by socialist-communist political movements in some countries, and the current European entanglement with transparency regulation, asset protection has re-emerged as a critical part of private client planning. There is a demand on lawyers to address the needs of personal security, family migration, political abuse, financial and market volatility, family business internationalisation, rather than solely focusing on tax. This panel will analyse how the legal profession is dealing with such protection needs without violating the transparency world and the responsibility imposed on advisors.

Moderators

Percy Castle *DS Casahierro Abogados, Lima*

Juan M González *Converge Wealth Planning, Miami, Florida*

Speakers

Gema De la Calle *Mavens Abogados, Madrid*

Philip van Hilten *No More Worries, The Hague*

Kathryn von Matthiessen *Katten Muchin Rosenman, New York*

1245 – 1400 **Lunch**

Headline social event sponsors



Monday continued

1400 – 1515

Roundtable session: hot topics in your jurisdiction

Participants will meet in small groups for an interactive discussion on the current issues and developments in their jurisdictions in the private client sector.

Roundtable Co-Chairs

Alessia Allegretti *Boies Schiller Flexner, Milan*

Michael Rutili *Stephenson Harwood, London*

Roundtable Moderators

K Eli Akhavan *Steptoe, New York*

Rosanne Bonnici *Fenech & Fenech Advocates, Malta*

James Bowden *Afridi & Angell, Toronto, Ontario*

Gretel Ciniglio *Fabrega Molino, Panama City*

Kira Egorova *Alrud Law Firm, Moscow*

Gerd Kostrzewa *Heuking Kühn Lüer Wojtek, Dusseldorf*

Daniel Simon *Collyer Bristow, London*

Rashad Wareh *Kozusko Harris Duncan, New York*

1515 – 1545 **Coffee/tea break**

1545 – 1700

Structuring in the Middle East

Middle Eastern clients often use offshore/overseas entities to structure the assets they acquire all over the world. What are the main reasons for that, and for not using more often structures such as UAE trusts and foundations, Saudi family offices/

corporations and others? What are the main characteristics of these entities and is it 'safe' to use them, whether by Middle Eastern clients or foreign clients to the region? This panel will address these topics, including a history of the above-mentioned structures, to whom and to which assets/projects this structuring is addressed and whether the structures in the Middle east might 'replace' other classical structures notably for the Middle Eastern clients.

Moderators

Carine Tohme *Tohme Law Firm, Beirut*

Ajay Wiltshire *Saffery Champness, Dubai*

Speakers

Marianne Kafena *Harbottle & Lewis, London*

Rima Mrad *BSA Ahmad Bin Hezeem & Associates, Dubai*

Sunita Singh-Dalal *Hourani & Partners, Dubai*

1900 **Conference reception and dinner**

Florence Hall, Royal Institute of British Architects

66 Portland Place, London, W1B 1AD

The etched floor-to-ceiling windows, glass doors and carved pillars of Florence Hall add a unique sense of occasion and provide a chic Art-Deco backdrop steeped with grandeur to our gala dinner.

Price: £180

One place per registered delegate is permitted. Transport is not provided.

Tuesday 7 March

0730 – 1700 **Registration**

0800 – 0900

Breakfast roundtable session: recruiting, retaining and developing the next generation of private client lawyers

Developing the next generation of private client lawyers has become only more complex as people evaluate and renegotiate the ways that they want to live and work in a post-pandemic world. Developments like flexible working patterns and alternative career paths drive organisations to find innovative solutions in this new era. In this roundtable the participants will discuss their experiences of recruiting, retaining and developing the next generation of private client lawyers, seen from the perspective of both senior management and the next generation.

Continental breakfast will be provided.

Roundtable Co-Chairs

Aidan Grant *Collyer Bristow, London*

Emilie Van Goidsenhoven *Tiberghien, Brussels*

Roundtable Moderators

Romain Desmots *Mc Dermott, Paris*

Alexandre Gobert *Arendt, Luxembourg*

Sandra Gulich-Merrad *Blumgrob, Zurich*

Jake Kaplan *Alston & Bird, Atlanta, Georgia*

Shawntel Randi *Nixon Peabody, Boston, Massachusetts*

Stefan Stellato *Hannes Snellman, Helsinki*

Jeannette Yazedjian *Karlin & Peebles, Los Angeles, California*

Associate conference sponsors



**Wealth
Management US**

Conference dinner sponsors

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0915 – 1030

Fifty ways to make a family: surviving and thriving in the task of advising the modern family

The next-generation members of our ultra-high net worth (UNHW) mobile private client families are spreading out around the globe. In new countries, the next generation finds and employs new ways to build their families. Please join this experienced panel of family law lawyers and international private client lawyers as they dissect the intricacies of advising families built by assisted reproductive technologies including posthumous conception and surrogacy, possibly in modern/untraditional family forms such as LGBTQ or polyamorous relationships, and possibly in countries whose parentage laws permit a court to order that a child has more than two parents. How do these advancements in the law affect existing plans? How should we be advising our clients from a planning perspective going forward?

Moderators

Tom Amlot *Alexiou Fisher Philipps, London*

Catherine Watson Coles KC *McInnes Cooper, Halifax, Nova Scotia*

Speakers

Line-Alexa Glotin *UGGC Avocats, Paris*

Hoon Shu Mei *Drew & Napier, Singapore*

Andrew Powell *4pb For Family, London*

Pleuni Visser *Loyens and Loeff, Amsterdam*

1030 – 1100 **Coffee/tea break**

1100 – 1215

Responsibilities of advisors: tales of the unexpected

The legal world has been working at short breath. Clients want answers to their questions that are often sent by email or messenger provider systems at once. However, their matters have a longer breath, and solutions provided may no longer be fit because circumstances have changed. Such changes can occur anywhere between highly personal issues such as sudden hostile divorces, spontaneous planning-free marriages, death or birth of persons entitled to an estate, falling-out with relatives, the rise or fall of family fortunes, sanctions imposed on the client or a family member, changes in the law and in the taxation, and unexpected changes in the order of decease.

- What happens if the legal solutions suggested by the legal team do not reflect the change nobody expected?
- As from when is there exposure for the law firm and/or advising lawyer?
- What is the legal standard to take changes into account?
- How much change expectation must we bear when advising?

Moderators

Ellen Kratzer *Fiduciary Trust Company International, New York*

Markus Zwicky *Zwicky and Partner, Zug*

Speakers

Tendon Dahortsang *Fischer Ramp Buchmann, Zürich*

Rachel Mainwaring-Taylor *Farrer & Co, London*

Stella Strati *Patrikios Pavlou & Associates, Limassol*

1215 – 1345 **Lunch**

1345 – 1515

Family office, a must have or a mixed bag?

Is a family office right for 'your family'? Considerations include:

- Where to set it up.
- How to staff it.
- What its role is.
- What challenges it faces in dealing with the family and outsiders.
- Privilege issues.
- Costs.
- Conflicts among family members.

This session will provide an insider's view of being inside the family office and the outsider's view of advising the family office.

- What will it do: own staff or just employ people, one jurisdiction or multiple?
- Regulatory consequences of what it does and where it sits?
- How to pay for it?
- What is its role vis à vis the family and vis à vis the investments or assets of the family?
- What is the role of the family office versus management of family businesses?
- What challenges does it face in dealing with the family: privilege issues, costs, conflicts among family members and other considerations?
- What challenges do advisors face dealing with family offices: incomplete information, gatekeeping?
- What challenges do family offices face dealing with advisors: lack of clarity, practical and actionable advice?

Moderators

Leigh-Alexandra Basha *McDermott Will & Emery, Washington DC*

Chris Potter *SETE, Geneva*

This session will be interactive and audience participation is encouraged

1515 – 1545 **Coffee/tea break**



Tuesday continued

1545 – 1700

Onshore–midshore–offshore: changing tides

Increased transparency and extensive 'Know Your Customer' procedures are sweeping the globe. What has this meant for traditional offshore jurisdictions? For onshore jurisdictions? And which jurisdictions should we consider as 'in transition'? What could current changes mean in the future? On which 'shores' are our clients located, and is that the correct place for them and for us? Do tax benefits and asset security really outweigh compliance burdens? Or is it time to repatriate and, going forward, gravitate towards onshore accounts and structures?

Using experts from various jurisdictions, and with the active participation of you all, this session will explore (and grade) the advantages and disadvantages of the new treatment of onshore and offshore jurisdiction, and check all that is in between these two, to encourage new thinking as to where and how to place structures, assets, and people.

Moderators

Guadalupe Díaz-Súnico *Gómez Acebo & Pombo, Barcelona*
Inbal Faibish Wassmer *Goldfarb Seligman & Co, Tel Aviv & Zurich*

Speakers

Ana Cristina Benedetti *Central Law, Panama City*
Matthew Guthrie *Ogier, St Peter Port, Guernsey*
Kevin Lee *Stephenson Harwood, Shanghai / Hong Kong*
Helene Rebholz *Paragraph 7, Liechtenstein*

The IBA, its officers and staff accept no responsibility for any views expressed, presentations or materials produced by delegates or speakers at the Conference.

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).

Continuing Professional Development/Continuing Legal Education

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, Conference delegates can use this to obtain the relevant number of hours' accreditation. 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.

A 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.

IBA Harassment Policy

IBA conferences provide unrivalled professional development and network-building opportunities for international legal practitioners and their professional associates. The IBA values the participation of every delegate and member of the IBA and wants all attendees to have an enjoyable and fulfilling experience. Accordingly, all Conference attendees are expected to show respect and courtesy to other attendees, IBA staff and those involved with hosting the events throughout the Conference and at all Conference events, receptions, and parties, whether officially organised by the IBA or others. All delegates, guests, attendees, speakers, exhibitors, staff and volunteers at any IBA event are required to conform to the IBA Harassment Policy.

See www.ibanet.org/iba-harassment-policy



Information

Date

5 – 7 March 2023

Venue

Claridge's
Brook Street
Mayfair, London
W1K 4HR

Fees

Online registrations received:

	on or before 20 January	until 28 February
IBA Member	£995	£1085
Non-Member*	£1130	£1220
Young lawyers	£745	£1220
Academics/judges	£745	£1220
Public Lawyers	£745	£1220
Corporate Counsel**	£895	£1220
Conference dinner	£180	£180

After 28 February 2023 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	£1105	£1205
Non-Member*	£1255	£1355
Young lawyers	£830	£1355
Academics/judges	£830	£1355
Public Lawyers	£830	£1355
Corporate Counsel**	£995	£1355
Conference dinner	£180	£180

* 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.

** A reduced rate is offered to IBA Corporate Group Members. Please contact confs@int-bar.org to obtain a 25 per cent discount on the IBA Member fee.

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. You can find full details of how to join 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.

Language

All working sessions and Conference materials will be in English.

How to register

Register online by **28 February 2023** at <https://www.ibanet.org/conference-details/CONF2298> 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 the Conference Department at the IBA together with your proof of bank transfer payment. You should receive an email confirmation of your registration within five days; if you do not, please contact confs@int-bar.org.

Full payment must be received in order to obtain your Conference documentation.

Fees include:

- * Attendance at all working sessions
- * Access to the Conference materials from the IBA website (www.ibanet.org), including any available speakers' papers submitted to the IBA before 28 February.
- * Access to the live delegate search
- * Buffet lunch on Monday and Tuesday
- * Tea and coffee during breaks
- * Invitation to hosted reception on 5 March
- * VAT currently at 20%

Please note that registrations are not transferable.

List of participants

In order for your name to appear in the list of participants, your registration form must be received by 28 February at the latest.

Live delegate search

Delegates are able to use the live delegate search via the IBA website, in order to use this function delegates will need to be logged into their MyIBA. This will allow search access to up-to-date attendance lists.

Registration confirmation

Upon receipt of your payment for the Conference a confirmation email will be sent to you which contains information regarding your attendance at the Conference. You will also be able to view and download your payment information and manage your registration via your My IBA profile on the IBA website.

Book with confidence

- If the IBA needs to reschedule the event, your registration will be automatically transferred to the new date and no additional fees will be charged. If this date is not convenient for a delegate, a refund of the cost of the conference place will be available on request to the IBA.
- If the IBA is unable to reschedule the conference within 12 months of the original scheduled date, a full refund of the cost of the conference place will automatically be made to all delegates.
- Please note that the IBA will not provide refunds for any costs incurred including any travel costs.

Please note, these terms are subject to any more restrictive or different local requirements, and may be altered and amended from time to time to reflect any changes to restrictions or government requirements.

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.

Payment of registration fees by bank transfer or BACS payment

Registration forms received without proof of payment will NOT be processed until proof of payment has been received.

Pounds sterling: by bank transfer or BACS payment 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.

SWIFT address NWBKGB2L, IBAN GB05NWBK56000313270222

Please ensure that a copy of the bank transfer details is attached to your registration form.

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

PLEASE ENSURE THAT YOUR NAME AND 'CONF2298LONDON' 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 conferences in venues of a suitable size for each 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 waiting list for a conference will close once it has reached ten per cent of the conference venue capacity, as it is very unlikely a place will become available. The IBA will not be liable for any travel or accommodation expenses incurred by an individual who travels to a conference without a confirmed place at the event.

Cancellation of registration or social functions

If cancellation is received in writing at the IBA office by **17 February 2023**, 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 or social function bookings received after **17 February 2023** will not be eligible for any refund of fees.

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.

Should you have difficulties in obtaining your visa and are not able to attend the Conference this cancellation policy will still apply.

Upon submission of your completed Conference registration form to the IBA you are considered 'registered' pending payment. Please note that the cancellation terms and conditions as indicated will apply as soon as your registration is received.

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.

Hotel accommodation

A limited number of rooms have been reserved at Claridge's for the nights of 5-7 March inclusive:

Claridge's
Brook Street
Mayfair, London
W1K 4HR

The following rates are per room, per night and exclude breakfast, service charges and local taxes.

Single room: £525

Please contact **Nicola Raynal**, Claridge's Events and Group Manager, to make your reservation:

Tel: +44 20 7629 8860

Direct line: +44 20 7409 6311

E-mail: nraynal@claridges.co.uk



Cancellation and no-show policy

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.

Please note that reservations are subject to availability and cannot be guaranteed at the special IBA rate.

As a limited number of rooms have been blocked at the hotel, availability cannot be guaranteed once the room block is full.

Delegates are responsible for making accommodation reservations directly with the hotel and entering into an agreement with the hotel regarding credit card guarantees, cancellation terms and conditions, and room rates (should these differ from the special IBA rate). The IBA cannot accept responsibility for hotel accommodation disputes between a delegate and the hotel.

Unauthorised accommodation agents

It has been brought to our attention that there are multiple companies contacting past attendees, claiming to represent the IBA, offering 'assistance' with registration and hotel bookings.

They are operating by cold-calling and spamming companies whose names have appeared on previous List of Participants, Programmes and Sponsorship recognition. The **only** Accommodation Agent the IBA works with is Judy Lane ICS. Judy Lane ICS do not contact delegates on behalf of the IBA without delegates making initial contact. Please ignore any communication that does not come directly from the IBA or Judy Lane ICS.

Disabled access

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

Social programme

Sunday 5 March

1800 – 1930 **Hosted welcome reception**

Phillips Auction House

30 Berkeley Square, Mayfair, London W1J 6EX

Conference reception kindly provided by Phillips Auction House.

All registered delegates are welcome to attend.

Monday 6 March

1900 **Conference reception and dinner**

Florence Hall, Royal Institute of British Architects

66 Portland Place, London, W1B 1AD

Price: £180

One place per registered delegate is permitted. Transport is not provided.

Registration form



28th Annual International Private Client Conference: new realities in the private client practice

5 – 7 March 2023, Claridge's, London, England

Please read the 'Information' section before completing this form and return it together with your proof of bank transfer to the Conference Department at the address below

REGISTER ONLINE AT WWW.IBANET.ORG/CONFERENCE-DETAILS/CONF2298 TO MAKE IMMEDIATE AND SECURE PAYMENT BY CREDIT CARD AND OBTAIN A TEN PER CENT DISCOUNT ON THE FEES BELOW

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 _____

_____ Country _____

Tel _____ Email _____

SPECIAL DIETARY REQUIREMENTS

If you have special dietary requirements, due to allergen intolerances, medical, religious reasons or a life choice, please specify the requirement below. The IBA is unable to cater for dietary requirements other than for the above reasons.

Please tick box if you have allergen intolerances and specify _____

Please state all other dietary requirements clearly, eg, I am vegetarian, my guest does not eat red meat.

Disclosure of dietary information denotes you have agreed to the IBA sharing this information with relevant third parties who are providing catering on our behalf.

TO OBTAIN A TEN PER CENT DISCOUNT ON THE FEES BELOW,
PLEASE REGISTER BY **28 FEBRUARY** ONLINE AT WWW.IBANET.ORG/CONFERENCE-DETAILS/CONF2298
IBA MEMBERS CAN REGISTER ONLINE BY **20 JANUARY** FOR **£995** 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	£1105	£1205	£
Non-Member*	£1255	£1355	£
Young lawyers	£830	£1355	£
Academics/judges	£830	£1355	£
Public Lawyers	£830	£1355	£
Corporate Counsel**	£995	£1355	£
Conference dinner	£180	£180	£
		TOTAL AMOUNT PAYABLE	£

*JOIN THE IBA TODAY AND REGISTER FOR THIS CONFERENCE AT THE IBA MEMBER RATE. PLEASE FIND THE MEMBERSHIP APPLICATION FORM AT WWW.IBANET.ORG.

** A REDUCED RATE IS OFFERED TO IBA CORPORATE GROUP MEMBERS. PLEASE CONTACT CONFS@INT-BAR.ORG TO OBTAIN A 25 PER CENT DISCOUNT ON THE IBA MEMBER FEE.

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.



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

METHODS OF PAYMENT

By credit card

Register online at www.ibanet.org/conference-details/conf2298 and make immediate and secure payment by credit card

Note: please do not send your credit card details on the registration form or within an email or fax.

By bank transfer or BACs payment

Registration forms received without proof of payment will NOT be processed until proof of payment has been received.

Pounds sterling: by bank transfer or BACS payment 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.

SWIFT address NWBKGB2L, IBAN GB05NWBK56000313270222

Please ensure that a copy of the bank transfer details is attached to your registration form.

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)

The International Bar Association would like to keep in touch with you about relevant news, events, publications and membership. You can opt out of receiving information at any time by emailing member@int-bar.org or by logging into My IBA and updating your preferences. Your details will be included in the list of participants. If you do not want your details to be included in the list, please email confs@int-bar.org.

For further details on how your data is used and stored: www.ibanet.org/privacy-policy

PLEASE SEND THE COMPLETED FORM TO INTERNATIONAL BAR ASSOCIATION:

Conference Department

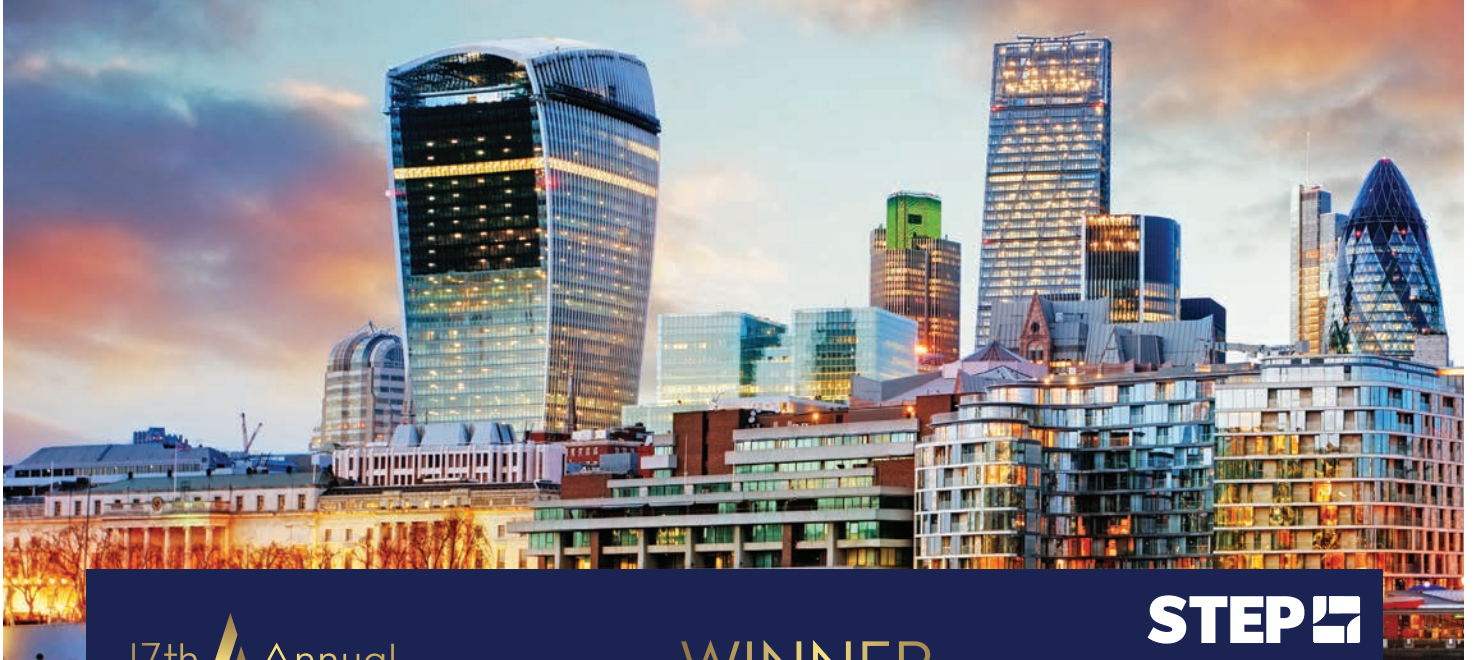
5 Chancery Lane, London WC2A 1LG, United Kingdom

Email: confs@int-bar.org www.ibanet.org

Bellecapital



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TRANSPARENT INVESTMENT ADVICE



17th Annual
**STEP PRIVATE
CLIENT
Awards**

WINNER

Private Client Legal Team
of the Year (large firm)

STEP

Five time winners of the STEP Private Client
Legal Team of the Year (large firm) since 2015

The leading choice for complex and specialist advice in private wealth, with one of the largest dedicated teams in the UK, Burges Salmon is recognised nationally and internationally for advising individuals, families and their global wealth.

We're delighted to be supporting the 28th Annual International Private Client Conference and our attendees look forward to seeing you there.



Suzanna Harvey
Head of Private Wealth

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Catherine de Maid
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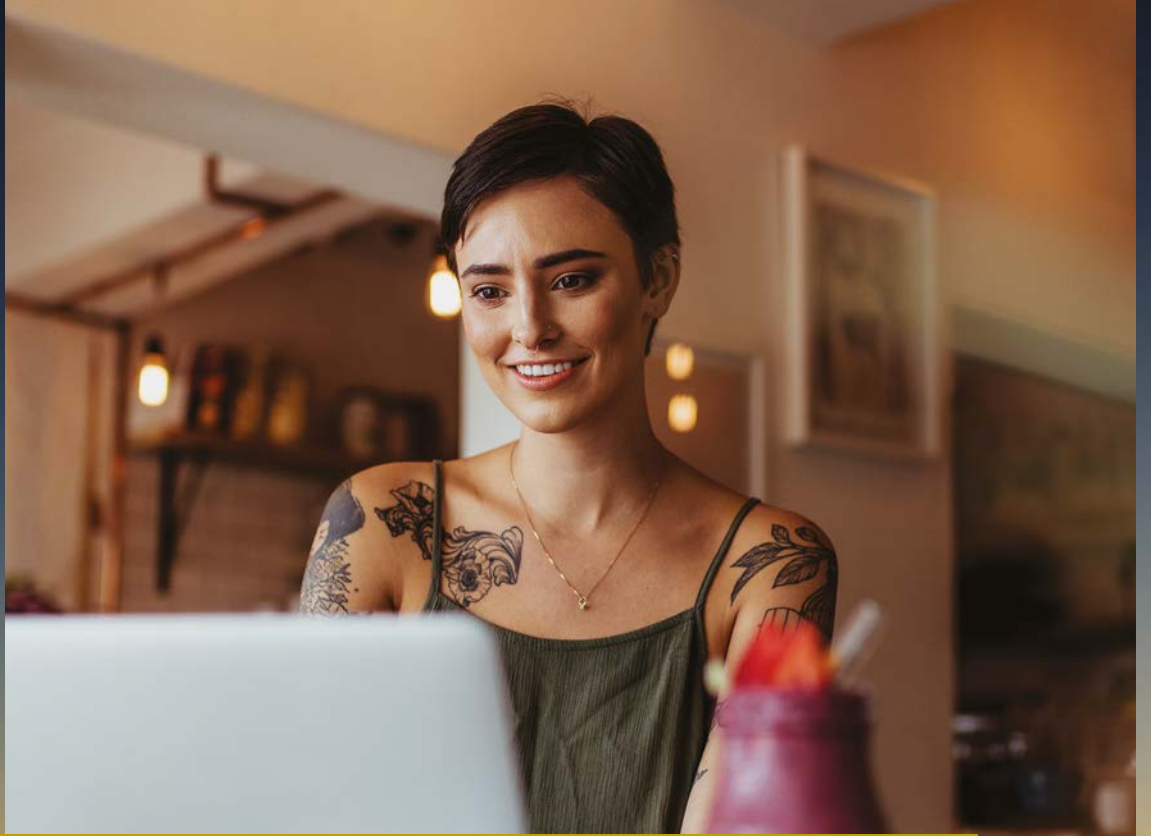


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International Bar Association

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, law firms 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 80,000 individual lawyers and more than 190 bar associations and law societies spanning over 170 countries.

Inspired by the vision of the United Nations, the IBA was founded in the same spirit, just before the Universal Declaration of Human Rights was proclaimed in 1948.

The IBA covers all practice areas and professional interests, providing members with access to leading experts and up-to date information, enabling them to better represent their clients' interests.

Through its various committees, fora, and task forces, the IBA facilitates the exchange of information and views among its members as to laws, practices and professional responsibilities relating to the practice of law around the globe.

Private Client Tax 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 Private Client Tax 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.

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