

Our next

## Luncheon Meeting

will be held

on **March 10, 2015**, at the **LAUSANNE PALACE HOTEL**, in Lausanne

The subject will be:

### «Back to USA! Planning for U.S. Situs Assets and U.S. Inbound Transactions»

*The Swiss private client industry cannot stay away from the USA forever. However, Swiss advisors need to be aware of the tax and legal implications.*

*This presentation will familiarize them with key U.S. estate, gift and income tax issues affecting foreign investment in the United States (including real property investment), migration of foreign individuals to the United States and persons contemplating wealth transfers to U.S. citizens, residents and domiciliaries through outright gifts and provisions in trusts, foundations and other planning vehicles. In addition to the overview of key U.S. issues to be considered by foreign advisors, there will be discussions on best practices for foreign advisors working with cross-border clients and issues, planning strategies to avoid/minimize the pitfalls of the U.S. estate tax and an update on the IRS 2014 Offshore Voluntary Disclosure Program.*

This topic will be addressed by **Mr. Todd D Hall**, in **English**.

Mr. Hall is a partner at the law firm Teeple Hall, LLP in San Diego, California, where he specializes in US and international tax and estate planning.

The **presentation will begin at 12:00**, followed by **lunch**. The meeting will **close at 14:00**.

To register for this lunch, please return the reservation form here attached, by e-mail ([antonia.vansaanen@swissinterim.ch](mailto:antonia.vansaanen@swissinterim.ch)) or by fax (0041 021 925 50 19). You will not receive any confirmation of your registration.

For the purposes of your Continuing Professional Development (CPD), this event will count as “1 structured CPD hour”.

We very much look forward to seeing you at this luncheon.

Best regards,

Antonia van Saanen  
Event Officer

Guillaume Grisel  
Chairman

*with the support of Swiss Interim TTF SA, Kendris SA & Stonehage SA*



ADVISING FAMILIES ACROSS GENERATIONS

S T E P – Society of Trust and Estate Practitioners  
Association STEP Lausanne – Office of the Secretary

**STEP LUNCHEON**

Subject : « Back to USA! Planning for U.S. Situs Assets and U.S. Inbound Transactions»  
Speaker : Mr. Todd D Hall  
Venue : Lausanne Palace Hotel at rue du Grand-Chêne 7-9, 1002 Lausanne  
Date : March 10, 2015, 12:00 – 14:00  
Price: CHF 50.— for STEP members / CHF 60.— for non-members

**RESERVATION**

Name : .....  
Tel. n°: .....  
Email address : .....  
Company : .....  
Name of additional guest(s) : .....

Doors open at 12:00, and presentation commences at 12:15 prompt.

**CONFIRMATION OF PAYMENT**

My payment of CHF ..... is made as follows:

- By bank transfer to Credit Suisse S.A., Lausanne, for credit to Association STEP Lausanne, account 0425-1430585-91, IBAN CH72 0483 5143 0585 9100 0, Swift address : CRESCHZZ10A, Clearing : 4835. Please make sure that your name(s) be mentioned by your bank!
- I will pay in cash at the door.

As we are liable for all reservations made, “No shows” will be required to pay. All attendees whose payment has not been confirmed 24 hours preceding the luncheon will be required to pay at the door. Cancellations in writing must be received by the Secretariat 24 hours before the event. Any payments received thereafter will be held on credit for future events. Thank you for your understanding.

Your signature : .....

**Please return this form, duly completed and signed, to us:**

- **By email:** to Antonia van Saanen, Event Officer of STEP Lausanne [antonia.vansaanen@swissinterim.ch](mailto:antonia.vansaanen@swissinterim.ch), or
- By fax (only if not possible by e-mail): 0041 21 925 50 19