

A conference presented by the IBA Private Client Tax Committee

# 27th Annual International Private Client Conference

12 – 14 June 2022

Claridge's, London, England

## Topics include:

- Tax residence in Covid-19 times: where do you find yourself as a taxpayer?
- Cybersecurity keynote
- Dealing with a sudden international crisis
- Roundtable: what's boiling hot in your jurisdiction
- Planning with trusts in the international sphere: a case study
- Breakfast roundtable: will clients ever be the same again?
- Panama, paradise, pandora – where is privacy or has DAC6 come too late?
- Wealth tax: a new golden era?
- The ultimate double cross: I prepared for divorce but my spouse died; I prepared for death but we are divorcing
- Crazy crypto but careful counsel



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# Programme

## Conference Co-Chairs

Jérôme Assouline *Cabinet Sekri Valentin Zerrouk, Paris; Co-Chair, IBA Private Client Tax Committee*

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

Natalie Peter *Blum & Grob Attorneys at Law, Zurich; Member, IBA Private Client Tax Committee Advisory Board*

## Sunday 12 June

### 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 be an opportunity to also view some great art as the Editions sale will be on view.

All registered delegates are welcome to attend.

## Monday 13 June

### 0745 – 1700 **Registration**

### 0845 – 0900 **Introduction by conference co-chairs**

0900 – 1015

### **Tax residence in Covid-19 times: where do you find yourself as a taxpayer?**

The Covid-19 pandemic placed new restrictions on the international lifestyle of the wealthy. Many of them had to change both their business and private plans and were forced to make a hard choice – where to stay during this time, and where to live in future.

Tax issues obviously were and continue to be a very important factor of such choice. The panel will observe what measures were taken by different jurisdictions to support the migration of their residents, which strategies should be considered by top professionals working remotely and how to properly respond and mitigate new tax risks.

*Session Chair*

**Raul Angelo Papotti** *Chiomenti Studio Legale, Milan;*

*Scholarship Officer, IBA Taxes Committee*

*Speakers*

**Line-Alexa Glotin** *UGGC Avocats, Paris*

**Juan Manuel González** *Senior Vice President, Itáu Private Bank, Miami, Florida*

**Mark Summers** *Charles Russell Speechlys, Zürich*

**Sonia Velasco** *Cuatrecasas, Barcelona*

**Kathryn von Matthiessen** *Katten Muchin Rosenman, New York*

### 1015 – 1045 **Coffee/tea break**

### 1045 – 1130 **Cybersecurity keynote**

*Keynote speaker*

**Ileana van der Linde** *Executive Director Asset & Wealth Management, JP Morgan Private Bank, New York*

1130 – 1230

### **Dealing with a sudden international crisis - navigating war, sanctions, anti-money laundering whilst protecting your firm, your clients, your reputation perhaps even your liberty**

*Session chairs*

**Gerd Kostrzewa** *Heuking Kühn Lüer Wojtek, Düsseldorf*

**Ajay Wiltshire** *Saffery Champness, St Sampson, Guernsey;*

*Publication and Newsletter Editor, IBA Private Client Tax Committee*

*Speakers*

**Gideon Benaim** *Simkins, London*

**Anna Bradshaw** *Peters and Peters, London*

Headline social event sponsor

# Monday continued

1230 – 1345 **Lunch**

1345 – 1515

## **Roundtable: what's boiling hot in your jurisdiction**

In a roundtable format, participants will share and discuss the current issues in their respective jurisdictions.

### *Session Chairs*

**Gretel Ciniglio de Pérez** *Fabrega Molino, Panama City*

**Claudia Suter** *Homburger AG, Zürich*

**Markus Zwicky** *Zwicky & Partner, Zug; Membership Officer, IBA Private Client Tax Committee*

### *Moderators*

**Alessia Allegretti** *Boies Schiller Flexner, Milan*

**Percy Castle** *DS Casahierro Abogados, Lima; Treasurer, IBA Private Client Tax Committee*

**Pierre-Alain Conil** *Morel d'Arleux Partners, Paris*

**Dimitria Coucouni Andreou** *Andreas Coucounis & Co, Larnaca*

**Paula M Jones** *Paula M Jones Law Offices, Philadelphia, Pennsylvania*

**Stefan Müller** *Wenger & Vieli, Zug*

**Michael Rutili** *Stephenson Harwood, London*

**Catherine Watson-Coles QC** *McInnes Cooper, Halifax, Nova Scotia; Member, IBA Private Client Tax Committee Advisory Board*

1515 – 1530 **Coffee/tea break**

1530 – 1645

## **Planning with trusts in the international sphere: a case study**

A practical panel covering the benefits of trust structures as well as some of the key issues to be aware of when advising international families in today's world.

### *Session Chairs*

**Elizabeth Kubanik** *Sullivan & Cromwell, London*

**Rachel Mainwaring-Taylor** *Farrer & Co, London; Conference Quality Officer, IBA Private Client Tax Committee*

### *Speakers*

**Richard Joynt** *Director of Highvern and Head of Family Office, Highvern, Jersey*

**Nicola Saccardo** *Maisto e Associati, London*

**Stephen Woodward** *Three Stone, London*

1900 – 2200 **Conference reception and dinner**

*Institute of Directors, 116 Pall Mall*

*St James's, London, SW1Y 5ED*

Join fellow delegates and speakers for the conference reception and dinner at 116 Pall Mall, a magnificent Grade 1 Georgian building designed by architect John Nash.

**Price: £150**

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

# Tuesday 14 June

0700 – 1700 **Registration**

0745 – 0900

## **Breakfast roundtable: will clients ever be the same again?**

Carine Tohme and Natalie Peter lead a lively round table discussion on the nature of work, clients, regulation, jurisdiction and the meaning of life itself.

### *Session Chairs*

**Natalie Peter** *Blum & Grob Attorneys at Law, Zürich; Member, IBA Private Client Tax Committee Advisory Board*

**Carine Tohme** *Tohme Law Firm, Beirut; Diversity and Inclusion Officer, IBA Private Client Tax Committee*

### *Speakers*

**Daniel Gabrieli** *Wenger Plattner, Zurich*

**Jochen Kotzenberg** *Flick Gocke Schaumburg, Bonn*

**Maximilian Riederer von Paar** *Rubin Winston Diercks Harris & Cooke, Washington DC*

0900 – 0930 **Welcome coffee/tea break**

Conference dinner sponsor

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Conference luncheon sponsor

**NPT**  
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0930 – 1045

## **Panama, paradise, pandora – where is privacy or has DAC6 come too late?**

Nowadays, we are trusted advisors to our clients, living in interesting times where privacy is breached via a multitude of repeated leaks which do not seem to end. These leaks are often organised via individuals and organisations who may or may not intentionally release information to the broad public, information which may affect our clients.

These clients merely seek the use of perfectly legitimate structures within the rule of law. Such breach of privacy should be clearly distinguished from the European Union (EU) obligation to report so-called potentially aggressive tax structures, which entered full force in early 2021.

The panel will discuss the symbiosis between both types of ‘shared information’. The framing of released information versus the legally foreseen yet forced sharing of information on tax advice, which is defined as potentially tax aggressive, will be drawn into a comparison thereby critically focusing on how clients may be advised to react.

*Session Chairs*

**Gerd Goyvaerts** *Tiberghien, Brussels; Vice Chair, IBA Private Client Tax Committee*

**Filippo Nosedà** *Mishcon de Reya, London*

*Speakers*

**Katie Emms** *Director, Portland Communications, London*

**Sarah Farrow** *Carey Olsen, St Helier, Jersey*

**Jenny L Longman** *Patterson Belknap Webb & Tyler, New York*

1045 – 1115 **Coffee/tea break**

1115 – 1230

## **Wealth tax: a new golden era?**

This panel will look at the role and design of wealth taxes, in particular in OECD jurisdictions.

- Are wealth taxes the right, also an efficient, way to address inequality?
- What are issues encountered across the various jurisdictions, how do you deal with value volatility, especially acute in the crypto category?
- Should there be a tax on luxury goods?
- And what about inheritance tax – is that a double taxation where there's already a wealth tax?

Also, the case for and against relief for business assets. Wealth tax, perhaps fool's gold after all?

*Session Chairs*

**Pedro Fernández** *Kinship Law Partners, Madrid*

**Michael Fischer** *Fischer Ramp Buchmann, Zürich*

*Speakers*

**Bryony Cove** *Farrer & Co, London*

**Eric Dorsch** *Kozusko Harris Duncan, New York; Committee*

*Liaison Officer, IBA Private Client Tax Committee*

**Marine Dupas** *Arkwood SCP, Paris*

**Pelayo Valdivia** *Fuensalida & Del Valle, Santiago*

1230 – 1400 **Lunch**

1400 – 1515

## **The ultimate double cross: I prepared for divorce but my spouse died; I prepared for death but we are divorcing**

A marriage will end by death or divorce, but have we sufficiently planned for both events? What are the challenges of preparing mainly for death or mainly for divorce for couples of different countries and/or with assets in different jurisdictions?

Can remedies be found when future spouses mainly planned for divorce, but one dies prematurely? Or when both spouses were convinced that it would be their last marriage but finally divorce?

Our speakers, covering both common law and civil law jurisdictions, will consider the pitfalls to avoid and debate on solutions.

*Session Chairs*

**Anne Guichard** *n3t Notaires, Paris; Vice Chair, IBA Private Client Tax Committee*

**Catherine Watson-Coles QC** *McInnes Cooper, Halifax, Nova Scotia; Member, IBA Private Client Tax Committee Advisory Board*

*Speakers*

**Marianne Kafena** *Harbottle & Lewis, London*

**Rosie Schumm** *Forsters, London*

**Tina Wüstemann** *Bär & Karrer, Zürich*

1515 – 1530 **Coffee/ tea break**



# Tuesday continued

1530 – 1645

## **Crazy crypto but careful counsel**

Crypto has always been full of crazy stories, think of: people going through rubbish dumps to find their lost bitcoin private keys; low-res 8 bit JPEG images of crypto punks selling for more than USD 1.5 million; or Elon Musk shilling dog-branded cryptos via Twitter. As advisers to private clients, slowly but surely all of us will be confronted with this brave new world – and it is better if we come prepared. We have put together a panel of experienced practitioners and hope to have some fun exploring the following topics:

- What can we expect in terms of crypto asset taxation in the next few years?
- How can crypto assets be valued?
- Can crypto assets be held in trust and what must trustees be aware of?
- How does succession planning with crypto assets work?
- What should you know about NFTs (non-fungible tokens) if your client is planning a substantial purchase?
- What can you do if your client has been scammed by some crypto con artist?

### *Session Chairs*

**Inbal Faibish Wassmer** *Goldfarb Seligman Law Office (Israel), Zurich; Secretary, IBA Private Client Tax Committee*

**Daniel Simon** *Collyer Bristow, London; Member, IBA Private Client Tax Committee Advisory Board*

### *Speakers*

**Sangna Chauhan** *Charles Russell Speechleys, London; Session Reporters Liaison Officer, IBA Private Client Tax Committee*

**Jake Kaplan** *Alston & Bird, Atlanta, Georgia*

**Niklas Schmidt** *Wolf Theiss, Vienna; Member, IBA Private Client Tax Committee Advisory Board*

**Matt Zimmerman** *General Counsel, Filecoin Foundation, San Francisco, California*

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 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](http://www.ibanet.org/iba-harassment-policy)

# Information

## Date

13 – 14 June 2022

## Venue

Claridge's  
Brook Street  
Mayfair, London  
W1K 4HR

## Language

All working sessions and Conference materials will be in English.

## How to register

Register online by 8 June at [www.ibanet.org/conference-details/CONF2123](http://www.ibanet.org/conference-details/CONF2123) 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](mailto:confs@int-bar.org).

## Conference registration criteria

**By registering for the conference you agree to the following delegate code of conduct, the host country's local and/or national requirements and venues restrictions and precautions :**

- You will not attend the conference if you are displaying any Covid symptoms
  - Should you develop any Covid symptoms during your attendance at the conference you inform a member of IBA staff by email ([confs@int-bar.org](mailto:confs@int-bar.org)) and you agree not to attend any further conference sessions or related events
  - comply with all local and national restrictions
- You travel at your own risk and you agree that the IBA cannot be held responsible if you contract Covid during the conference or after returning from the conference
- You agree to the extent permitted by law that you shall not hold IBA responsible for: any travel costs incurred for travelling to and from the conference; any travel costs that may be irrecoverable due to the cancellation or postponement of the conference; any losses or liabilities associated with contracting Covid whether on the way to, during or after the conference.
- You agree that, if asked by the relevant local or national authorities, the IBA has permission to pass on your personal information and contact details to those authorities should contact tracing be required.

## Fees

*Online registrations received:*

	until 8 June
IBA member	£985
Non-member *	£1,120
Young lawyers (under 30 years)	£1,120
Academics/judges (full-time)	£1,120
Public lawyers	£1,120
Corporate counsel **	£1,120

After 8 June registrations must be received in hard copy at the IBA office.

*Hard copy registration forms and fees received:*

	after 29 April
IBA member	£1,095
Non-member *	£1,245
Young lawyers (under 30 years)	£1,245
Academics/judges (full-time)	£1,245
Public Lawyers	£1,245
Corporate counsel **	£1,245
Conference reception and dinner	£150

\* 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:

- Password access to certain parts of the IBA website.
- Receipt of *IBA E-news* and access to online versions of IBA Global Insight.
- Pay the member rate for any subsequent Conference registrations for this calendar year.

\*\* A reduced rate is offered to IBA Corporate Group Members. Please register online 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](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 obtain your Conference documentation.**

### Fees include:

- \* Attendance at all working sessions
- \* Access to the Conference materials from the IBA website ([www.ibanet.org](http://www.ibanet.org)), including any available speakers' papers submitted to the IBA before 6 June
- \* Access to live delegate search
- \* Lunch on Monday and Tuesday
- \* Hosted welcome reception on Sunday
- \* Tea and coffee during breaks
- \* VAT currently at 20 per cent

**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 8 June 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.

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**Book with confidence**

- The IBA will offer a full refund if you are required to cancel your registration due to Covid related reasons; we will require written confirmation of your cancellation by the end of business on the first day of the conference.
- 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 other 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.

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**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 '[CON2123LONDON]' 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.

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**Cancellation of registration or social functions**

If cancellation is received in writing at the IBA office by 27 May 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 27 May will not be eligible for any refund of fees. Please note that the IBA will however offer a full refund if you are required to cancel your registration due to Covid related reasons; we will require written confirmation of your cancellation by the end of business on the first day of the conference.

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

**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](mailto: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](mailto:sponsorship@int-bar.org).

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.

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.



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### 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

Hotel information can be found via the Accommodation tab on the conference website: [www.ibanet.org/conference-details/CONF2123](http://www.ibanet.org/conference-details/CONF2123).

The Conference does not have a reserved room block at a hotel.

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. 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

The hotel is wheelchair accessible. Please notify us if you require special assistance.

### Social programme

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 be an opportunity to also view some great art as the Editions sale will be on view.

All registered delegates are welcome to attend.

Monday 13 June

1830 – 2200 **Conference reception and dinner**

*Institute of Directors, 116 Pall Mall  
St James's, London, SW1Y 5ED*

Join fellow delegates and speakers for the conference reception and dinner at 116 Pall Mall, a magnificent Grade 1 Georgian building designed by architect John Nash.

**Price: £150**

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

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# Registration form

## 27th Annual International Private Client Conference

13 – 14 June 2022, Claridge's, London



Please read the 'Information' section before completing this form and return it together with your bank transfer or cheque to the Conference Department at the address overleaf.

REGISTER ONLINE AT [WWW.IBANET.ORG/CONFERENCE-DETAILS/CONF2123](http://WWW.IBANET.ORG/CONFERENCE-DETAILS/CONF2123) TO MAKE IMMEDIATE AND SECURE PAYMENT BY CREDIT CARD AND OBTAIN A 10 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)* \_\_\_\_\_

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, i.e. I am a vegetarian; I do 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 **29 APRIL** ONLINE AT [WWW.IBANET.ORG/CONFERENCE-DETAILS/CONF2123](http://WWW.IBANET.ORG/CONFERENCE-DETAILS/CONF2123)

REGISTRATION FORM AND FEES RECEIVED:	after 29 April	amount payable
IBA member	£1095	£
Non-member*	£1,245	£
Young lawyers (under 30 years)	£1,245	£
Academics/judges (full time)	£1,245	£
Public lawyers	£1,245	£
Corporate counsel **	£1,245	£
Social functions		FREE
<b>Hosted welcome reception</b> Sunday 12 June, 1800 - 1930	<input type="checkbox"/> I shall attend FREE	
<b>Conference reception and dinner</b> Monday 13 June, 1830 - 2200	<input type="checkbox"/> I shall attend FREE	£150
<b>Breakfast roundtable</b> Tuesday 14 June, 0745 - 0845	<input type="checkbox"/> I shall attend FREE	FREE

**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](http://WWW.IBANET.ORG).

\*\*A REDUCED RATE IS OFFERED TO IBA CORPORATE GROUP MEMBERS.  
PLEASE REGISTER ONLINE 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/conf2123](http://www.ibanet.org/conference-details/conf2123) 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 and BACS payment

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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?

- |   |   |   |                                   |  |
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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.

### **IBA Private Tax Committee**

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.

### **Contact information**

#### **International Bar Association**

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