



Symposium on Estate and Tax Planning for Multinational Families

FRIDAY, JUNE 1, 2018
Golden Gate University, 536 Mission Street, San Francisco, CA 94105

Agenda

7:30am	Registration and Breakfast
8:00am	Domestic Recent Developments <i>Andrew M. Katzenstein, Partner, Proskauer Rose, LLP, Los Angeles</i>
9:00am	International Recent Developments <i>Cynthia D. Brittain, Senior Vice President, Northern Trust, Santa Barbara</i> <i>Andrew Haave, Vice President, Goldman Sachs, New York</i>
10:15am	Break
10:30am	Chinese and American Planning Issues with Offshore Trusts <i>Kevin Qian, Partner, McDermott Will & Emery LLP, Shanghai</i> <i>Laurelle M. Gutierrez, Partner, McDermott Will & Emery LLP, Menlo Park</i> <i>Michael Rosen-Prinz, Partner, McDermott Will & Emery LLP, Los Angeles</i>
11:45am	Lunch Presentation: The U.S.: The Last Bastion of Freedom? Ethical, Fiscal and Criminal Issues for Planners Whose Clients Wish to Avoid CRS <i>Joseph Field, Senior Counsel, Pillsbury, New York</i>
1:00	Adjourn



MCLE: 4.5 Hours, CE CREDIT: 4.5 Hours. This has been approved for MCLE credit by the State Bar of California in the amount indicated above. Farella Braun + Martel LLP is a certified provider. This program follows the CE guidelines specified in the California Board of Accountancy Regulations.

Secure your place at
www.step.org/sf-symposium18

REGISTRATION FEES:	EARLY-BIRD RATE	AFTER MAY 15, 2018
STEP and SFEPCC Members	\$150	\$200
Non-Members	\$200	\$250

ABOUT STEP

STEP is the global professional association for practitioners who specialize in family inheritance and succession planning. We work to improve public understanding of the issues families face in this area and promote education and high professional standards among our members. STEP members help families plan for their futures, from drafting a will to advising on issues concerning international families, protection of the vulnerable, family businesses and philanthropic giving. Full STEP members, known as TEPs, are internationally recognized as experts in their field, with proven qualifications and experience. For more information visit www.step.org

ABOUT SFEPCC

The San Francisco Estate Planning Council is a highly recognized interdisciplinary organization established in 1953 for San Francisco professionals involved in estate planning, providing its members with opportunities to enhance their skills and expand their network through programs and interaction. The Council has five (5) dinner meetings each year. At each meeting, we have a speaker who discusses a relevant topic. The Council's Bylaws provide for six membership categories: (1) Accountant, (2) Attorney, (3) Financial Services Provider, (4) Trust Officer, (5) At Large and (6) Academic. For more information visit www.sfepcc.org