



GENEVA GROUP INTERNATIONAL

## GGI WORLD CONFERENCE

20 – 22 OCTOBER 2016

BANGKOK, THAILAND

### TRUST & ESTATE PLANNING PRACTICE GROUP

Henry Charles - *partner of Citroen Wells Chartered Accountants in the UK*

Chairperson for the European Region

## ***The Trust and Estate Planning Practice Group***

### **Vision**

Since its inception in 2011, the **Trust and Estate Planning Practice Group** has remained true to the vision originally established by its Leadership Team and has also managed to accomplish many of the objectives it set out to achieve.



## ***The Trust and Estate Planning Practice Group***

### **Objectives**

Given the mobility of high net worth private clients, there is now a need for those in the trust and estate profession to be able to identify cross border issues and to develop and maintain a network of colleagues with whom such issues can be properly addressed.

#### **The Purpose and Objectives of the TEPPG are:**

- “ To provide a focus for GGI members from the legal, accountancy and business advisory professions whose occupation includes a significant involvement with any of the planning, creation, management and accounting for, trusts and estates, executorship administration and any related taxes.
- “ To promote discussion of aspects of tax, accounting, administration statute and case law that are of general concern to trust and estate practice group members.
- “ To advance training and learning and to promote the practical aspects of cross border trust and estate planning and administration.

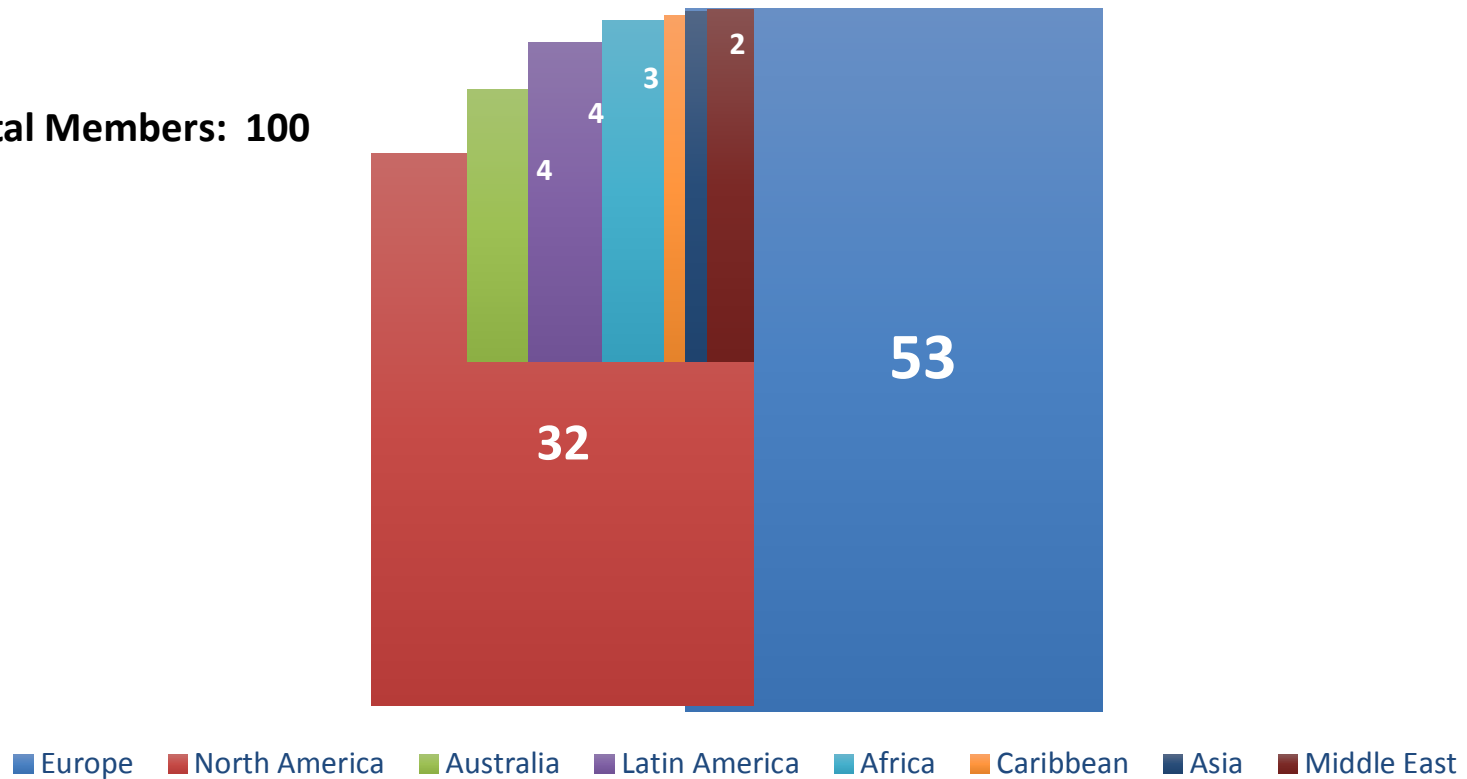


## *The Trust and Estate Planning Practice Group*

### Membership

Total Members: 100

### Regions





GENEVA GROUP INTERNATIONAL

## ***The Trust and Estate Planning Practice Group***

### **Regional Leadership Team**

- “ **Global Chairman**  
Steven L. Cantor of Cantor & Webb P.A., USA
  
- “ **Global Vice Chairperson**  
Sergio Guerrero Rosas of Guerrero Santana Tax, Audit & Consulting, Mexico
  
- “ **Chairperson for the North American Region**  
Dennis Nerland of Shea Nerland Calnan LLP, Calgary, Canada
  
- “ **Chairperson for the European Region**  
Henry Charles of Citroen Wells Chartered Accountants, London, United Kingdom



## ***The Trust and Estate Planning Practice Group***

### **Communication Tools**

- “ Our group’s primary form of communication has been via Skype calls and/or email. Given the distances, physical meetings are challenging. Going forward, we would like to establish 2 Leadership Team Skype calls per year.
  
- “ To date, we have principally used email to encourage participation by our group members.
  
- “ We try to **motivate active participation** within our practice group by providing interesting topics relevant to our members.



## ***The Trust and Estate Planning Practice Group***

### **Marketing**

To promote the PG, Practice Group meetings and publications of regular articles within the GGI Insider have proven to be the best promotional tools. Going forward, our PG is considering the following projects:

- “ The promotion of our PG meetings through content on the various GGI related Social media sites – particularly the establishment of a PG specific LinkedIn group.
- “ The possible addition of webinars and resources as a means of promotion.



GENEVA GROUP INTERNATIONAL

## ***The Trust and Estate Planning Practice Group***

### **Planned Projects**

- “ Expansion of our Practice Group through the establishment of additional Regional Chairpersons, specifically in South/Central America as well as Asia
- “ Article & Commentary Contributions in the PG Newsletter and the GGI LinkedIn Group
- “ Future Webinars and Resources as a Means of Promotion





GENEVA GROUP INTERNATIONAL

***THANK YOU!***

***Henry Charles - Citroen Wells***

***+44 (0) 20 7304 2000***

***henry.charles@citroenwells.co.uk***

***www.citroenwells.co.uk***