

GGI WORLD CONFERENCE

19 – 21 OCTOBER 2017
VIENNA, AUSTRIA

TRUST & ESTATE PLANNING PRACTICE GROUP

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



The Trust and Estate Planning Practice Group

Vision

Since it was first created 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 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 Practice Group 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.

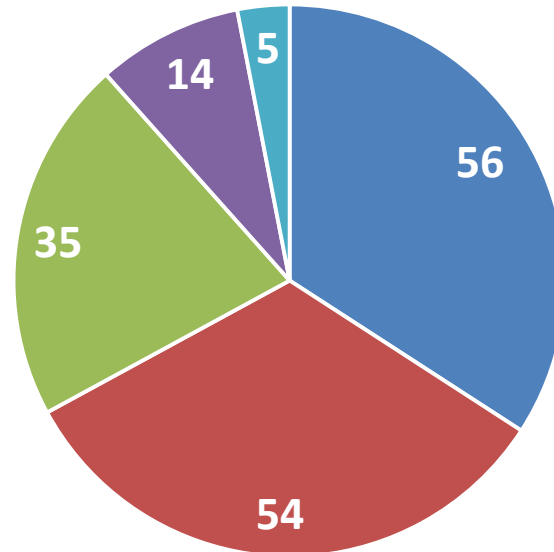
To advance training and learning and to promote the practical aspects of cross border trust and estate planning and administration.

The Trust and Estate Planning Practice Group

Membership

Total membership: 164

Region



■ North America ■ Europe ■ Latin America ■ Asia Pacific ■ Middle East Africa



The Trust and Estate Planning Practice Group

Regional Leadership Team

- **Global Chairpersons**
Henry Charles of Citroen Wells Chartered Accountants, London, United Kingdom
Dennis Nerland of Shea Nerland Calnan LLP, Calgary, Canada
- **Global Vice Chairperson**
Sergio Guerrero Rosas of Guerrero Santana Tax, Audit & Consulting, Mexico
- **Chairperson for the South America Region**
Fernando Retzler Martins of WFaria Advogados, Sao Paulo, Brazil
- **Chairperson for the Far East Region**
Paul Gambles of MBMG Group, Bangkok, Thailand

The Trust and Estate Planning Practice Group

Communication Tools

- Our group's primary form of communication has been via telephone calls and email. Given the distances, physical meetings are challenging.
- 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.
- The possible addition of webinars as a means of promotion.



The Trust and Estate Planning Practice Group

Planned Projects

- Expansion of our Practice Group through the establishment of additional Regional Chairpersons.
- Article & Commentary Contributions in the Insider and a PG Newsletter Group.
- Future Webinars as a Means of Promotion.

THANK YOU

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