

Minutes - ITPG WebEx Meeting North America – 31 July 2012

Dear GGI North America Members:

I would like to thank the member firms for participating in our WebEx call on **Tuesday, July 31, 2010**.

The meeting started promptly at 11 am PST and finished with only a 2 minutes over our 1 hour time.

A special thanks goes to:

Charlene Yee - for setting up the WEB X conference and general trouble shooting

Peter Trieu and Cindy Hsieh for the materials and advance agenda

The following is a summary of the call:

1. Attached is the PPT for the presentation that covered:

- Taxation of Residents
- Update on Cross Border reporting

Also attached is a pre-arrival tax planning checklist that was prepared for the recent GGI meeting in Miami.

Lessons learned for future presentations:

- The presentation lasted 40 minutes.
- We had limited emails from participating firms.
- We then provided a call in number for open discussion of presentation and administrative matters.

For next meeting, it might work better for members if the PPT and presentation was limited to 20 minutes and then to switch over to the conference call so members had more time to raise technical Q and A.

2. We have the following schedule for upcoming calls:

Date	Firm	Subject
Tuesday, September 25, 2012	Doris Hsu, Ruchelman Law Group (New York)	TBD
Tuesday, November 20, 2012	Doug Dickey, DRDA PLLC (Houston)	Year-end planning
Tuesday, January 29, 2013	Steve Cantor, Cantor & Webb (Miami)	TBD - Estate/Gift/Trust planning
Tuesday, March 26, 2013	Richard Mastrocola, Tonneson + Co (Boston)	TBD - corp and individual tax update for 2012, planning strategies 2013
Tuesday, May 29, 2012	Kim Moody, Moodys Tax Advisors (Calgary)	Doing business in Canada or Tax Considerations for Americans Moving to Canada

3. Archiving articles and presentations of interest: Brian Rowbotham will discuss with GGI how to provide a resource for members. The key will be to make technical information available without creating an administrative behemoth.

4. IBFD Subscription: EUR 2957 per user. For more information please contact Amiran Kavkasidze at GGI headquarter kavkasidze@ggi.com

5. Other Announcement:

Steve Cantor is heading up the Estate and Trust Section for GGI and will be in Rome to cover upcoming activities. He is looking for suggestions re:

- Content to cover in future meetings
- Suggestions for regional chairs for NA, Europe, Asia, Latin America
- Send your comments directly to steve@cantorwebb.com

We look forward to having you on the call in September.

Thank you.

Brian
ITPG North America Chair