



## GENEVA GROUP INTERNATIONAL

### North America ITPG WebEx Conference 26 March 2013

# Minutes

Dear ITPG North America Members:

Thank you to those of you who joined the webex today. Special thanks to John Parker of Tonneson+Co of Wakefield, Massachusetts for putting together an informative presentation on the recent US legislations and planning ideas for 2012/2013 tax years. Enclosed is a copy of John's presentation.

Summary of Minutes:

	<u>Name</u>	<u>Location</u>	<u>Firm</u>
1	Alexandra Pongracz	Atlanta, Georgia	AGH
2	Art Dichter	Miami, Florida	Cantor & Webb
3	Brian Marita	Beachwood, Ohio	Ciuni & Panichi
4	Brian Rowbotham	San Francisco, CA	Rowbotham & Co
5	Cindy Hsieh	San Francisco, CA	Rowbotham & Co
6	Diana Gamtone	Wakefield, Massachusetts	Tonneson+Co
7	Doug Dickey	Houston, Texas	DRDA, PLLC
8	Frank Bi	San Francisco, CA	Rowbotham & Co
9	John Freeman	Wakefield, Massachusetts	Tonneson+Co
10	John Parker	Wakefield, Massachusetts	Tonneson+Co
11	Kevin Irlbeck	Atlanta, Georgia	AGH
12	Robert Kaplow		

**a. 11:00am Presentation on Fiscal Cliff Legislation and Planning Opportunities, by John Parker of Tonneson+Co.**

**b. 11:40am Upcoming GGI conferences** and other professional organizations

- 4/18/2013 to 4/21/2013: GGI European Conference 2013 in Lisbon, Portugal
- 5/2/2013 to 5/4/2013: GGI North America Developing Leaders Conference 2013 in Boston, Massachusetts
- 5/9/2013 to 5/12/2013: North America Regional Conference in San Francisco, California
- 5/28/2013: ITPG North America WebEx: Kim Moody on Doing Business in Canada or Tax Considerations for Americans Moving to Canada
- 10/31/2013 to 11/3/2013: GGI World Conference in Cancun, Mexico



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**c. 11:45am Mark your calendar for future North America ITPG WebEx sessions:**

<b>Date</b>	<b>Firm</b>	<b>Subject</b>
Tuesday, May 28, 2013	Kim Moody, Moodys Tax Advisors (Calgary)	Doing business in Canada or Tax Considerations for Americans Moving to Canada

**d. 11:46am Other suggestions and open forum:**

Brief discussion on software used for estimated tax computation: BNA, ProSystem, etc.

**e. 11:50am Meeting adjourned**

Please contact me if you have any questions.

Thank you.

Best Regards,

Brian Rowbotham  
Chair of ITPG North America