



## GENEVA GROUP INTERNATIONAL

### North America ITPG WebEx Conference 29 January 2013

# Minutes

Dear ITPG North America Members:

We started 2013 with active participation for our first WebEx of the year, with members joining the conference from Canada, Mexico, France, Spain, and various member firms in USA.

A big thanks to Steve Cantor and Hal Webb for the insightful presentation yesterday on ***"An overview of various interesting complexities related to the use of trusts, foundations, "domestic" LLCs and similar entities in international tax and estate planning."*** Enclosed is a copy of the PowerPoint presentation.

#### Summary of minutes:

<b>Attendees</b>	
1	Anthony, Robert
2	Cantor, Steve
3	Chung, Connie
4	Dichter, Art
5	Hsieh, Cindy
6	Irlbeck, Kevin
7	Lapausa, Santiago
8	Marita, Brian
9	Nerland, Derek
10	Rowbotham, Brian
11	Trieu, Peter
12	Ulrich, Peter
13	Webb, Hal
14	Yim, Karena

**a. 11:00am Welcome and intro - Brian Rowbotham**

**b. 11:05am Presentation from Steve Cantor and Hal Webb** - An overview of various interesting complexities related to the use of trusts, foundations, "domestic" LLCs and similar entities in international tax and estate planning.

**c. 11:45am Upcoming GGI conferences** and other professional organizations

- 2/8/2013 to 2/10/2013 ITPG Winter Meeting International Taxation in Amsterdam, The Netherlands
- 3/26/2013: ITPG North America WebEx - Richard Mastrocola on 2012 tax filing updates, planning for 2013 strategies



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- 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

**d. Mark your calendar for future North America ITPG WebEx sessions:**

<u>Date</u>	<u>Firm</u>	<u>Subject</u>
Tuesday, March 26, 2013	Richard Mastrocola, Tonneson + Co (Boston)	TBD - corp and individual tax update for 2012, planning strategies 2013
Tuesday, May 28, 2012	Kim Moody, Moodys Tax Advisors (Calgary)	Doing business in Canada or Tax Considerations for Americans Moving to Canada

**e. Other suggestions and open forum**

**f. 12pm Meeting adjourned**

Please contact me if you have any questions.

Thank you.

Best Regards,

Brian Rowbotham  
Chair of ITPG North America