



GGI CONFERENCES GMBH

NORTH AMERICAN REGIONAL CONFERENCE 25-27 OCTOBER 2011

Toronto, Canada

Practice Group Summary

Estate Planning, Trusts & Private Equity

Steven L. Cantor – Cantor & Webb P.A., USA

Co-chaired by:

Frank Shostack, Black Sutherland LLP, Canada

Prof. Robert Anthony, Anthony & Cie, France

The session will consist of a discussion of case studies involving cross border tax and estate planning issues encountered by tax professionals who represent United States and Canadian private clients. As well as an introduction to the practice group.

“PG Estate Planning, Trust & Private Equity”: Introduction by Professor Robert Anthony

- Biography of Prof. Robert Anthony, Global Chairperson
- PG “Estate Planning, Trusts & Private Equity” purposes
- Main Benefits to take part in the PG “Estate Planning, Trusts and Private Equity”

Case studies by Steven L. Cantor and Frank Shostack:

- Canada – U.S. Estate Planning for the Cross-Border Executive
- The Multi-National Family – Tax Planning Challenges of living on both sides of the border
- Retirement Planning – When Canadian Snowbirds Plan to Retire in the Sunshine of Florida
- Tax Compliance - Ooops! Was I Supposed to Report My Financial Information Back to The U.S.?