

STEP European Cross Border Conference: Private Client, Succession Planning and Tax in the EU

Date: 4 May 2011

Venue: Frankfurt Marriott Hotel,
Hamburger Allee 2,
60486 Frankfurt/M

STEP Frankfurt is very pleased to be hosting this year's STEP European Cross Border Conference. This half day conference on 4 May 2011 is part of the commitment of STEP worldwide to bring together practitioners both from the common law world and from continental Europe to discuss current practical legal and tax issues. The conference will focus on current EU developments, in particular the status of the succession directive (Rome IV), the perception of continental European marriage contracts (pre-nuptial agreements) by other jurisdictions and an introduction to the concept of trusts and trust taxation in Germany. The programme will be completed by a panel session on legal and tax structures which are of interest to German residents with cross-border ties.

The format of this conference will differ from any previous conference of STEP Frankfurt. This half day programme on 4 May 2011 opens with a buffet lunch giving plenty of networking opportunities. During the conference programme with international speakers we will provide simultaneous translation (English to German) allowing everyone to exchange ideas and thoughts. In the evening, all delegates are welcome to attend a dinner in the Rheingau. On 5 May 2011, the annual STEP Frankfurt conference is to follow focusing on domestic German topics. Delegates attending both conference days will get a discount on the second day.

12.30pm – 1.30pm	Networking Lunch
1.30pm – 1.45pm	Chairmans Welcome and Introduction <i>Dr Daniel Lehmann TEP, Chairman STEP Frankfurt</i>
1.45pm – 2.30pm	EU Agenda for Cross Border Succession and Family Taxation <i>Richard Frimston TEP, Russell-Cooke LLP, UK</i> <ul style="list-style-type: none">• Inheritance & European Union
2.45pm – 3.45pm	Introduction To Trusts and their Taxation In Germany <i>Dr Daniel Lehmann TEP, Chairman STEP Frankfurt</i> <i>Gavin St Pier TEP, Deputy Chairman, STEP Worldwide</i> <ul style="list-style-type: none">• Introduction to trusts• Taxation of trusts in Germany
3.45pm – 4.15pm	Coffee Break
4.15pm – 5.15pm	Local Legal/Tax Structures Panel Session <i>Toby Harris TEP, Toby Harris Tax Consultancy, UK</i> <i>Dr Daniel Lehmann, Chairman STEP Frankfurt</i> <i>Anneke Vrenegoor TEP, Heering Associates, Netherlands</i> <ul style="list-style-type: none">• Cross Border issues with German Involvement
5.15pm – 6.00pm	Prenuptial Agreements and Matrimonial Property Regimes <i>Richard Frimston TEP, Russell-Cooke LLP, UK</i> <i>Anneke Vrenegoor TEP, Heering Associates, Netherlands</i>
6.00pm – 6.15pm	Summary and Questions
7pm	Drinks and Dinner Hosted by STEP Frankfurt (optional)

Additional Options

If you would like to attend either the dinner and drinks on 4 May (€75) or the STEP Frankfurt Conference on 5 May (reduced fee for all Cross Border Conference delegates), please contact manuela.mckensie@debema.de

Register

Cancellations

Cancellations must be received in writing at least seven days before the date of the conference and will be subject to an administration charge of £25/€30. It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full conference fee. Substitutions may be made at any time provided the organisers are notified prior to the conference. Please note that if a non-STEP member attends in lieu of a STEP member the difference in fees will be charged.

Registration Fee

The conference registration fee includes participation in the conference, lunches and documentation material, which will be distributed at the beginning of the event. Please note that the evening event is not included in the registration fee. All bookings are considered binding on receipt of the registration form.

Conference Language

This conference will be presented in English, but simultaneous translation into German will be provided for all who require it. Please indicate on the form below if you require this facility.

Conference Documentation

If you are unable to attend the conference and would like to purchase a copy of the conference documentation email orders@step.org

Accreditation

The event is accredited under the CPD scheme as follows, subject to the appropriate claim being made by the delegate: Society of Trust and Estate Practitioners – 4.5 hours structured training.

Disclaimer

It may be necessary for reasons beyond the control of the conference organisers to alter the content and timing of the programme or the identity of the speakers.

Society of Trust & Estate Practitioners

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Register online at
www.step.org/events



This form may be photocopied for additional delegates. Please print in block capitals.

Conference registration form

Title: _____ First Name: _____

Surname: _____ Designation: _____

Email for booking confirmation/invoice: _____

Firm: _____

Job Title: _____ Department: _____

Postal Address: _____

Post Code: _____

Tel No: _____

Fax No: _____

Access/Dietary Requirements: _____

Please note that we may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event.

I require simultaneous translation from English into German

Yes

No

How did you hear about this conference?

We would like to keep you up-to-date with STEP news and events. If you do not wish to receive such information from STEP, please tick this box

Payment

Delegate Rates

STEP Members: £95/€110

Non Members: £125/€145

Credit Card – VISA & Mastercard only.

To make payment by credit card please register online at www.step.org/events

Cheques

Must be crossed and made payable to **STEP Conferences**.

Please send a cheque with this completed booking form.

To qualify for the STEP Member rate, please confirm your STEP Membership No:

Alternatively, you may register online, and send a cheque with your invoice.

STEP Conferences
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11-19 Artillery Row
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United Kingdom

Bank Transfer

Please register online at www.step.org/events. Please then quote the invoice number on your payment and send your remittance advice to accounts@step.org

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