

AGENDA
(and contents)
IAG International Open Meeting & Assembly
BOLOGNA

9.30am, Friday 26th February 1999

Chairman's Welcome

0930 - 1030

Administrative Items

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1030 – 1100 Coffee

1100 – 1300

Technical Sessions

At this part of the Programme the Meeting will divide into two technical sessions and delegates will be asked to indicate beforehand which session they would like to attend. The technical sessions will include a presentation of topical interest made by IAG members who will then encourage delegates to discuss the issues concerned. Places will be allocated on a “first come first served” basis.

A. Tax and Estate Planning for Wealthy Individuals

Part 1 The Mechanics of holding funds offshore (1 hour)

Martin Katz and Rebecca Sorby of Trinity International will explore the relative merits of Hybrid Companies and Trusts and the safeguards to divide ownership form benefit for tax purposes.

Brigitte Birnleitner of Juricon Trust Company will examine the options available in jurisdictions with a civil code – including family foundations and establishments.

There will be plenty of opportunity for discussion.

Part 2 Lump Sum Taxation for Foreigners (1 hour)

Michael Hamm of Staiger Schwald & Roesle will look at the rules and regulations of lump sum taxation in Switzerland.

Peter Speed, tax partner of Bentley Jennison will deal with the privileged tax provisions in the United Kingdom for foreigners without gainful activity.

Again, delegates are encouraged to debate the issues raised and if there are any particular circumstances which they would like the meeting to consider, let the Administration Office have the details in advance.

OR

B. International Franchises

Avv Antonio de Capoa of Studio Legale de Capoa who has many years experience acting for both franchisors and franchisees will cover the development of franchising in non-Anglo Saxon countries.

He will be joined by guest speakers Avv Giuseppe Rossi, (a close collaborator with Italy’s leading legal authority on franchising, Prof. Frigiani of the University of Milan) and a senior member of the Italian Franchise Association, Assofranchising.

1300 – 1430 Lunch

Continued ...

1430 – 1500

Observers Presentations

Dr Appelhagen and Partner, lawyers, Braunschweig & Magdeburg

Represented in Bologna by Dr Joachim Gulich

Liner Yankelevitz Sunshine Weinhart & Reigenstreif LLP, lawyers, California

Represented in Bologna by Randall Sunshine

1500 – 1630

Technical Session

Effective PR and Marketing for Professional Practices and

Managing your practice profitably

The first part of the session will be led by Christopher Whitamore of Christopher Whitamore & Associates, a marketing professional with background in the financial sector.

Dietmar Huemer of Saxinger Baumann & Partner will be contributing to the discussion by identifying key aspects of his firm's practice development by examining the production of a brochure and marketing plan.

In the second part, Arthur Bailey of Bentley Jennison will focus on strategies for profitable practice management.

Delegates will be welcome to contribute examples of their own.

1630 Close of Meeting