

INTERNATIONAL ESTATE PLANNING FOR INDIVIDUALS

14 October 2008 (Tuesday) • 5.00-7.00pm; Viewing Gallery, Level 8, Supreme Court Building

About this Seminar

In this talk, the speaker - Mr. Simon Phelps - will discuss the following:

1. Review of possible alternative structures, particularly in the context of asset protection, tax planning, holding real estate and general estate planning.
2. Consideration of the comparative pros and cons.
3. Some ideas for dealing with the “cons”.
4. Is the Trust the answer?

Seminar Programme

4.45-5.00pm	Registrations & Refreshments
5.00-5.10pm	Opening Remarks
	<i>Mr. Bill Lexmond - President, STEP Singapore</i>
5.10 - 6.15pm	International Estate Planning
	<i>Mr. Simon Phelps - Partner, Berwin Leighton Paisner LLP</i>
6.15-6.30pm	Q&A Session & Closing Remarks
6.30 - 7.00pm	Networking Break for Delegates

About the Speaker

Mr. Simon Phelps - Partner, Berwin Leighton Paisner LLP

Simon has been a partner at the law firm of Berwin Leighton Paisner in London since 1991. He is a member of STEP and the Chartered Institute of Taxation. He specialises in estate planning, capital and income taxation and offshore and onshore trusts, mainly for non-UK individuals and families, with particular emphasis on business owners and property investment. Increasingly, Simon's focus is on clients from the Middle East and Far East. Much of the work involves co-ordination of clients' estate planning arrangements in different jurisdictions, especially for their European assets.

About the Chairperson

Mr. Bill Lexmond - Managing Director, Wealth Planning, UBS AG; President, STEP Singapore

Bill Lexmond is a Managing Director with UBS in Singapore. His focus is on Wealth Planning for Key Clients in Asia Pacific. He studied in Canada at University of Waterloo (Mathematics) and Queen's University (Law). He has been involved in trusts and taxation for over 20 years, in Canada and in Asia. In Singapore, prior to joining UBS in 2004, Bill was with PricewaterhouseCoopers for 7 years and Citibank for 21/2 years. Bill is currently the Singapore Chair of the Society of Trust and Estate Practitioners and is on the Board of the Singapore Branch of the International Fiscal Association. Bill has spoken at and/or chaired many seminars in Asia, including the STEP Asia Conferences held in Singapore October 2005 and 2007.

REGISTRATION FORM

Name (Dr/Mr/Mrs/Miss/Mdm): _____

Name and Address of Organisation: _____

STEP Membership No: _____ Position in Organisation: _____

Tel number: _____ Fax number: _____ Email: _____

(A valid email address is required for confirmation of registration.)

MEMBERSHIP (Please circle as appropriate.)

FEES

Members of STEP

S\$50

CPA Australia, CPA Singapore/ICPAS, International Fiscal Association (IFA), Law Society of Singapore, Singapore Corporate Counsel Association (SCCA), Singapore Trustees Association (STA), Singapore Association of the Institute of Chartered Secretaries and Administrators (SAICSA)

S\$50

Others

S\$80

STEP Member **CPA Australia Member** **ICPAS/CPA Singapore Member** **IFA Member** **Law Society Member**

SAICSA Member **SCCA Member** **STA Member** **Others**

Mode of payment:

Cheque

Telegraphic Transfer

Internet Banking

Telegraphic Transfer Details:

Account Name: STEP (Singapore Chapter) Account Number: 048-017070-6 SWIFT code: DBSSGSG

Bank Details: DBS Bank Address: Raffles Place Branch, 22 Malacca Street, #01-00 Royal Brothers Building, Singapore 048980.

Please email secretariat@step.org.sg after the T/T has been done for our follow-up with the bank. Registration fees must be received nett of all bank charges.

Cheque Details:

Cheque payments should be made payable to "**STEP (SINGAPORE CHAPTER)**" & arrive at our office at "c/o INTELLITRAIN PTE LTD, 3 Raffles Place #07-01 Bharat Building S048617" with the completed registration form on or before the closing date, **Tuesday, 7 October 2008**.

For further enquiries, please contact: STEP (Singapore) Secretariat

Tel: 31287781 (no 6 prefix) Fax: (65) 63299699 E-mail: secretariat@step.org.sg

Website: www.step.org.sg

REGISTRATION, REFUND & CANCELLATION POLICY

1. Registrations will be confirmed upon receipt of full payment accompanied by a duly completed registration form.
2. The Organisers reserve the right to refuse to register or admit any participant, and to cancel or postpone the course.
3. Equivalent substitute delegates are welcomed, subject to the Organisers being notified at least 2 working days before the course of the substitute delegate.
4. The Organisers will not entertain any request for a refund of fees. However a confirmed registrant who has paid in full the course fees but does not turn up for the course will be entitled to collect a set of the materials provided.