Effective Planning for French / UK Private Clients

Advising on the interaction of estate & tax planning between UK & France

Expert Speakers Include:

Zoë Sive
Partner
KINGSLEY NAPLEY

Caroline Cohen
Managing Partners
THE FRENCH LAW PRACTICE

Jonathan Burt
Partner
HARCUS SINCLAIR

Vincent Lazimi
Director
SOPHER & CO

Edward Reed
Partner
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14th May 2015
Grange Tower Bridge, London

9.00 Registration

9.30

Chair's Opening Remarks

Zoë Sive
Partner
KINGSLEY NAPLEY

Zoë is an international private client lawyer. She joined Kingsley Napley as a partner in May 2014 from Baker & McKenzie LLP. Zoë has considerable experience in complex UK and multi-jurisdictional tax, trust and wealth structuring for high net worth individuals, trustees and financial institutions.

9.35

The Patriarch: Inheritance, Gift and Trust Planning for:

- French resident and domiciled testators, settlors and beneficiaries (including with usufructs)
- UK resident and domiciled testators, settlors and beneficiaries
- UK resident, French domiciled testators, settlors and beneficiaries (including the UK/France capital taxes treaty)

Caroline Cohen
Managing Partners
THE FRENCH LAW PRACTICE

Caroline is a French national, dual qualified in France and in the UK. She advises high net work individuals and trustees on cross-border tax, trust and succession planning issues. She has a particular emphasis on French clients based in the UK and on UK clients investing in France.

Mathew Duncan
Partner
KINGSLEY NAPLEY

Matthew joined Kingsley Napley LLP as Head of Private Client in March 2010 from Dawsons LLP, where he was a Partner in the Private Client department. His particular expertise includes dealing with complex tax planning, trust and estate issues for both UK and international high net worth individuals and trustees.

10.15

Crossing the Channel – Key Tax Points and Traps for:

- French res and dom individual moving to the UK

Frederic Mege
Partner, Tax & Private Capital
WRAGGE LAWRENCE GRAHAM MONACO

Frederic works from our Monaco and Paris offices to give expert advice that helps clients not only to mitigate tax but also to make sure the right amount and level of tax is paid. His role is often particularly significant for clients considering the purchase of a French residential property.

- UK res and dom individual moving to France

Vincent Lazimi
Director
SOPHER & CO

Vincent Lazimi was admitted to the Bar in 2005. In 2004, he obtained a PhD in international tax law from Dauphine University in Paris. He joined Sopher & Co in 2013 after working in Paris for the US law firm Kramer Levin.

10.55 Refreshment Break

11.10

Life Insurance

- French tax advantages & pitfalls
- UK tax advantages & pitfalls
- Moving to France with UK life insurance
- Moving to the UK with French life insurance

Chris Edward
Senior Wealth Planning Consultant
LOMBARD ODIER

With 15 years of international financial planning experience, Chris is leading the UK International Team in Luxembourg, Switzerland and Monaco working together with banks, family offices and advisers to design tax and estate planning solutions for high net worth individuals with UK connections.

11.50

Reporting Obligations, Disclosure Opportunities and Amnesties

- French
- UK
- Global
- Putting the UK and French internal obligations into a global perspective e.g. FATCA /OECD common reporting standard etc.

Dominic Arnold
Associate, Head of Tax Investigations & Disputes
MOORE STEPHENS

Dominic leads the Tax Investigations and Disputes practice at Moore Stephens LLP. He specialises in resolving difficult tax investigations and disputes and also assists clients in making disclosures under HMRC programmes such as the Liechtenstein Disclosure Facility and Contractual Disclosure Facility. Before joining Moore Stephens, Dominic spent 18 years in a variety of investigation and compliance roles with HMRC.

12.30 Lunch

1.30

Case Studies:
The Property Magnate & Tax Repercussions including Business Investment Relief

- French resident investing in UK property
- UK resident (dom v non dom) investing in French property
- Residential v rental / commercial property
- Use of companies and trusts

Edward Reed
Partner
MACFARLANES

Edward is a partner in private client. He advises on UK and international wills, trusts and personal tax planning. Having been educated both in the UK and in France, Edward has developed an affinity for civil law issues generally and acting for French-speaking and Swiss-based clients in particular.

Jonathan Burt
Partner
HARCUS SINCLAIR

Jonathan Burt is a private client tax and trusts lawyer with many years of international experience. Jonathan joined Harcus Sinclair as a partner in 2012. His core specialisms are UK tax, international trusts and wealth structuring and advising trustees and beneficiaries on existing trust or foundation structures.

Caroline Cohen
Managing Partners
THE FRENCH LAW PRACTICE

2.10

Case Studies: The Entrepreneur

- French entrepreneur investing in the UK
- UK resident entrepreneur investing in France

Vincent Lazimi
Director
SOPHER & CO

Zoë Sive
Partner
KINGSLEY NAPLEY

Liz Henson
Partner
PwC

Elizabeth Henson, is a senior tax partner who leads our Private Client and Private Business team in London. She retains a client-facing relationship partner role alongside her leadership responsibilities, She focuses primarily on International Entrepreneurs, advising top end business people on the tax structuring of all of their assets, whether personal or business, on a global basis

2.50 Refreshment Break

3.05

Case Studies: The Investor

- Luxury assets in France/the UK

Frederic Mege
Partner, Tax & Private Capital
WRAGGE LAWRENCE GRAHAM MONACO

- Financial investments for French and UK residents

Speaker to be confirmed

3.45

Family and Matrimonial Planning

- Pre-nups
- Divorce proofing new and existing structures

William Healing
Partner
KINGSLEY NAPLEY

William provides advice on family law and especially cases with an international element. He is a dual Franco-British national and a bilingual French speaker. Many of his cases have a French or European cross-border angle.

Delphine Eskenazi
Partner
LIBRA AVOCATS

Delphine Eskenazi has over ten years of experience in renowned international and French law firms (Bird & Bird, UGGC Avocats). She has developed a specific expertise in complex international litigation. She also acts as an expert on French legal questions before foreign courts and in particular in Anglo-Saxon countries.

4.25

Global Perspective

- Comparing France to continental Europe / Francophone jurisdictions
- Global context

Zoë Sive
Partner
KINGSLEY NAPLEY

Nadine Vandenberghe
Wealth Planning
UBS

Further panellists to be confirmed

5.00

Chairman's Summation

5.10 Close of Conference

Effective Planning for French / UK Private Clients FKW52936

14th May 2015 • Grange Tower Bridge, London

International Cross Border Estate Planning FKW52935

15th May 2015 • Grange Tower Bridge, London

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14th May 2015

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