

ARKWOOD WEALTH MANAGEMENT TRAINING DAY

Wealth Management Seminar, June 29, 2018
La Maison de La Recherche
54 rue De Varenne, 75007 Paris
France

8:30am to 6pm

The Wealth Management Training Day is an event organized by Arkwood once a year, in June. Our team will take this opportunity to highlight various news and insight related to the Wealth Management industry with panelists around the world (lawyers, notaries, etc.).

The workshops are organized around technical presentations, practical feedback and case studies. The foreign countries represented depend on the topics discussed.

All the workshops will be held in French (except the speeches of William Healing and Matthew Ledvina which will be in English). Questions could be asked in French.

Speakers

France

Stéphanie Auferil, Arkwood SCP

Marine Dupas, Arkwood SCP

Michael Khayat, Arkwood SCP

Julien Riahi, Arkwood SCP

Delphine Eskenazi, Libra Avocats

Caroline Emerique-Gaucher, Monassier & Associés

Guillaume Micolau, SCP Vaz - Touzet - Aumont

Belgique: Benoit Philippart de Foy - Aurélien Vandewalle, Joyn Legal

USA: Matthew Ledvina, Anaford AG

UK: Caroline Cohen, The French Law Practice - **William Healing**, Alexiou Fisher Philipps

Canada: Luc Pariseau, Lavery De Billy

Program

8:30 – 9:00 Welcome breakfast

9:00 – 9:30 Wealth Management hot topics: World Tour and focus on Belgium, UK, Canada and US.

This session will provide an opportunity to comment on the most significant evolutions in the legal and tax environment relating to private clients and to analyze the Wealth Management Industry's trends.

A specific focus will be made on the French, UK and US headlines.

9:30 – 10:45 Strategies for a successful relocation to France? Belgium/UK/Canada

In the context of France renewed attractiveness, this session will focus on opportunities available for individuals planning to relocate to France, coming from Belgium, UK and Canada.

Our panelists will identify opportunities and focus points of departure and arrival jurisdictions, and the application of double tax treaties, if any.

10:45 – 11:15 Coffee break

11:15 – 12:30 Belgium and UK tax residents: what are the best structuring opportunities to hold French real estate assets?

SCIs are usually used by individuals structuring their acquisition of French real estate assets, even by non-French tax residents. Attention will be drawn on UK and Belgium jurisdictions where the SCI tax transparency is not recognized and may lead to double taxation situations.

This session will provide an opportunity to study the most appropriate holding structures for UK and Belgium individuals investing in French real estate properties.

12:30 – 14:00 Lunch in the garden, weather permitting

14:00 – 15:45 Workshops in small working groups

Our plenary sessions will be completed by workshops in small working groups. The purpose is to multiply the topics discussed by allowing the participants to benefit from a better access to the speakers.

Two sessions in a row of 45-minutes each are open for registration. Alternatively, it will be possible to have an informal discussion with certain panelists.

For planning purposes, please pick your workshops while registering.

14:15 – 15:00

- Option 1** Marriage and divorce France-UK: Risks and traps
- Option 2** French wealth tax on real estate ("IFI"): Pending issues
- Option 3** France-US relationships: Strategies for French individuals living in the US, and for Americans living in France

15:15 – 16:00

- Option 1** International succession: Practical aspects
- Option 2** Canada: Overview of tax and legal developments – Relocating or investing in Canada in 2018
- Option 3** Belgium: Civil and tax reforms – Life-insurance as a tool for tax planning

16:00 – 16:30 Coffee break

16:30 – 17:45 Selected case law related to the topics of the day

This session will be an opportunity to exchange views on a specific selection of recent Court decisions.

Speakers will focus on recent development on substance issues, and more generally on fight against tax fraud.

17:30 – 17:45 Wrap-up session

17:45 – 18:30 Cocktail in the garden, weather permitting