

## ARKWOOD WEALTH MANAGEMENT TRAINING DAY

Wealth Management Seminar, Septembre 20, 2019  
La Maison de La Recherche  
54 rue De Varenne, 75007 Paris  
France

8:00 am to 6:30pm

The Wealth Management Training Day is an event organized by Arkwood once a year. For the first time, this year our event will be held on September 20, 2019 and not in June as it has traditionally been the case. 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. Questions could be asked in French or English.

### Speakers

#### France

Stéphanie Auferil, Arkwood SCP  
Marine Dupas, Arkwood SCP  
Michael Khayat, Arkwood SCP  
Julien Riahi, Arkwood SCP  
Arnaud Tailfer, Arkwood SCP  
Caroline Emerique-Gaucher, Monassier & Associés

Belgium: Aurélien Vandewalle, Joyn Legal  
UK: Caroline Cohen, The French Law Practice  
Switzerland: Robert Desax, Walder Wyss Ltd.  
USA: Fanny Karaman, Ruchelman

## Program

### 8:00 – 8:30 Welcome breakfast

### 8:30 – 10:15 Tax treaties overview: new situation

The gradual entry into force of the Multilateral Instrument has substantially modified the approach and the use of bilateral income tax treaties.

To the technical intricacies which are underlying this subject, is now added the hazardous exercise of integrating inputs of the Multilateral Instrument on a case-by-case basis.

Our panelists will review the practical details of these modifications through case studies applied to Switzerland, Luxemburg, and UK.

### 10:15 – 10:45 Coffee break

### 10:45 – 12:30 Real estate assigned: a new future?

French real estate, often considered as prime target of the tax legislator, is however still attractive to French and foreign investors. The tremendous growth of para-hostel and co-working activities over the past few years contributes to the significant benefits that they provide on the tax side.

Our team will review the multiple perspectives of this particular investment, which is at the crossroads of several legal and tax regimes. We will outline a crossboarding review of most of the taxes involved (corporate tax, income tax, VAT, transfer duties, etc...) supported by our experience gained from cases handled by our Boutique Law Firm.

### 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.**

### 14:00 – 14:45

- ☐ **Option 1** Structuring for French individuals investing in US real estate
- ☐ **Option 2** DAC 6: keys to understand the obligations of intermediaries and to limit exposure
- ☐ **Option 3** Brexit: the best opportunities for relocating to France

### 15:00 – 15:45

- ☐ **Option 1** French-Swiss situation: where do we stand?
- ☐ **Option 2** New EU regulation on matrimonial regime
- ☐ **Option 3** Belgium: recent news and impact on the French-Belgium estate planning

### 15:45 – 16:15 Coffee break

### 16:15 – 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.

Mixing recent development in case law, in depth study and case study, this session will highlight topics at hand.

Finally, speakers will take this opportunity to decode the anti-abuse measures which make headlines: “mini abuse of law”, concept of “main” tax purpose (vs. exclusive), etc....

### 17:45 – 18:00 Wrap-up session

### 18:00 – 18:30 Cocktail in the garden, weather permitting