

# AGENDA

## MIAMI 6TH ANNUAL SUMMIT

### FRIDAY MAY 29 2015

8:00am to 9:00am	Registration and Breakfast Sponsored by Bessemer Trust
9:00am to 9:15am	Opening Remarks Hal Webb - Cantor & Webb, STEP Miami Chair Alicia Green, BVI Finance Marketing Manager - Platinum Sponsor
9:15am to 10:15am	Succession Planning for Family Businesses Amy Renkert-Thomas - Withers Consulting Group - New Haven, Connecticut James Stewart - Clairmont Trust Company Limited - Nassau, Bahamas
10:15am to 11:15am	Jurisdiction Updates: Chile, Colombia, Ecuador Alex Fischer - Carey - Santiago, Chile Javier Robalino-Orellana - Paz Horowitz Robalino Garces - Quito, Ecuador José Andres Romero - Brigard & Urrutia - Bogotá, Colombia
11:15am to 11:30am	Morning Coffee Break Sponsored by CTC
11:30am to 12:15pm	Marketing Your Services, Attracting New Business and Maintaining Valuable Relationships David Lorenzo - Valtimax Consulting - Miami, Florida
12:15pm to 1:00pm	Lunch Sponsored by Lombard
1:00pm to 1:30pm	Networking and Dessert Break Sponsored by Coconut Grove Bank

1:30pm to 2:30pm	Tax and Estate Planning for Central American Clients with US Heirs Daniel Araya - Arias & Muñoz - San José, Costa Rica Steven L. Cantor - Cantor & Webb - Miami, Florida Andres Hernandez - Carillo & Asociados - Guatemala José Manuel Jaen - Assets Trust - Panama City, Panama Juan José Alcerro Milla - Aguilar Castillo Love - Tegucigalpa, Honduras
2:30pm to 3:15pm	Breakout Sessions • The Use of Life Insurance Products for International Private Clients Helmer Arizmendy - Lombard - Miami, Florida Georgina Marquez - Global Insurance Solutions Group - Miami, Florida Diego Polenghi - International Planning Group - Miami, Florida Alejandro Gil Rivero - Willis AG - Miami, Florida • How to Prepare Form W-8BEN-E Alfredo Tamayo - Packman, Neuwahl & Rosenberg, Coral Gables, Florida Shawn P. Wolf - Packman, Neuwahl & Rosenberg, Coral Gables, Florida
3:15pm to 3:30pm	Afternoon Coffee Break Sponsored by JTC Group
3:30pm to 4:30pm	A Comparison of Domestic and Foreign PTCs, Including US Tax Pitfalls to Avoid Simon Beck - Baker & McKenzie - Miami, Florida Ceci Hassan - Baker & McKenzie - Miami, Florida
4:30pm to 5:30pm	A Special Look at Different Options for Trusts and Holding Companies Jonathan Bailey - Nerine - BVI Lawrie Kearns - Ogier - BVI Carlos Pimentel - Appleby - Grand Cayman
5:30pm to 7:00pm	Cocktail Party Sponsored by Amicorp

### Sponsors include

