



HKTA seminar: US Beneficiaries of Foreign Trusts

Trusts are used by families the world over to provide for long-term succession planning and centralized asset management for the benefit of multiple generations of the family. However efficient as an estate planning tool, trusts can be quite complex when it comes to actually benefiting the persons they have been created for. Depending on the classification of the trust from a US income tax perspective, US beneficiaries may be taxed in respect of their interests in non-US trusts. It is important to understand these trust classification rules and what they mean from a US tax perspective.

16
APR
2024

Tuesday
1.00PM - 2.00PM

REGISTER NOW

HKMA, 14/F Fairmont House, 8 Cotton Tree Drive, Central



1 HKTA CPD point
1 CPD point for Law Society
being applied for



English



HKTA member \$500
Non-member \$600

Speaker



- **Ms. Jeannette Yazedjian, Head of Wealth Planning North America, Sequent (North America) LLC**

Jeannette joined Sequent in April 2023. Prior to joining Sequent, Jeannette was an international private client attorney in Los Angeles advising multinational and multigenerational families on cross-border tax planning strategies and family governance. She has extensive experience counselling families on their financial and personal interests involving the United States, both inbound and outbound, including advising on US income, estate and gift tax consequences particular to the ownership of US and global assets.

Jeannette is a member of Sequent's Wealth Planning team, dealing with new business development in North America, the legal aspects of existing trust structures at Sequent, and the implementation of tax and regulatory changes.

HKTA Seminar:

US Beneficiaries of Foreign Trusts



香港信託人公會
Hong Kong Trustees' Association

Enrolment Form

Date : 16 April 024 (Tuesday) Time : 1:00pm - 2:00pm

Language : English

Fee : \$500 HKTA member

Venue : HKMA, 14/F Fairmont House, 8 Cotton Tree Drive, Central \$600 Non-member

CPD credit : 1 HKTA CPD point & Law Society being applied for

Company Details

Company Name :

Contact Person :

Email :

Phone Number :

Attendee(s) Details

First name	Last Name	Email	Tel no.	Fee
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member
				<input type="checkbox"/> \$500 HKTA member <input type="checkbox"/> \$600 Non-member

Total:

Payment method

- ☐ Cheque payment (payable to "HK TRUSTEES' ASSOCIATION LTD") is attached and sent to HKTA, Room 739, 7/F, Grand Millennium Plaza, 181 Queen's Road Central, HK
- ☐ By bank transfer (**Standard Chartered Bank A/C No. 447-0-024582-3**). Please **email the bank receipt** (indicate attendee's full name and seminar date on it) to carmenwong@hktrustees.com. Please include payment of all bank charges if you settle the payment via bank remittance.

e-Receipt will be issued in favour of company name unless otherwise stated:

Note:

- Enrolments with full payment are accepted on a first-come-first-served basis.
- Post payment and post-dated cheque will NOT be accepted.
- Payment is non-refundable unless the event is cancelled by the Association.
- Enrolled participants will receive an e-mail confirmation at least 2 working days before the seminar. Unsuccessful applicants will also be notified around the same time. If you have not heard from us, please contact the HKTA Secretariat at 3511 6030 or queries@hktrustees.com. Seminar recording is not available.
- The e-Attendance certificate will be issued within 10 working days after the seminar.
- Attendees must provide and sign in the seminar with the same full name provided in this enrolment form.
- No CPD point will be granted if the attendee is late or early departure for 10 minutes for the seminar.
- If a black rainstorm warning or typhoon no. 8 is hoisted, the seminar may be cancelled or postponed. Please refer to the Association's announcement on its website on the day of the seminar.

Do you require a CPD Certificate?

☐ Yes, CTP no.

☐ No