

NYSBA INTERNATIONAL SECTION, SEASONAL MEETING

Seminar
Montreal, QC
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Attorneys

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Practices & Industries

Canada-U.S. Cross-Border

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Harmonizing Wealth Transfer across the Canada-United States Border: The Challenges of Canada-United States Estate Planning

Millions of U.S. persons and Canadians own property, have established residence, often spend time, or have relatives and loved ones “on the other side of the border.” This panel will provide an introduction to some of the basic rules, challenges, and “traps for the unwary” in providing effective estate and related tax planning advice to U.S. and Canadian clients with important personal and financial ties to both countries.

Co-Chairs:

Glenn Fox, Baker McKenzie, New York
Rachel Blumenfeld, Aird & Berlis LLP, Toronto

Panelists:

Britta McKenna, Hodgson Russ LLP, Buffalo
Daniel Frajman, Spiegel Sohmer Inc., Montreal
Michael Galligan, Phillips Nizer LLP, New York

