

Private Placement Life Insurance (PPLI) and Annuities (PPVA) 2014

"The content of the conference was excellent, based on practical ideas and current issues."

J. Rosenbloom,
Shaw & Co

Register by
7th March 2014
& **SAVE
£200!**

CPD:
Up to 6.5
Hours

Maximising Income & Asset Protection, Tax, Estate & Retirement Planning Efficiencies for Your Private Clients

Insights from Leading Experts:



Joseph Field
Of Counsel

WITHERSWORLDWIDE



Brent Vanderbrook
CEO

W LIFE ASSURANCE COMPANY



Perry Lerner
CEO and Chair

CROWN GLOBAL INSURANCE
GROUP, LLC



Mark Summers
Partner, Head of International
Private Client, Zurich

SPEECHLY BIRCHAM AG



Grayson Dufrene
Managing Director

VIE INTERNATIONAL



Thomas Morante
Partner

HOLLAND & KNIGHT



Jeremy Franks
UK Head of Wealth Planning
Advisory

UBS WEALTH MANAGEMENT



Jonathan Epstein
Partner

HOLLAND & KNIGHT



Wayne Johnson
Partner

JOHNSON, GIORDANO
& ROTH, APC



Tom Bounty
Partner

GSRP, LLP



William Jean-Baptiste
Senior Associate

SPEECHLY BIRCHAM

Why You Should Attend

Attend PPLI & PPVA 2014 and hear about:

- PPLI and PPVA Market: **Current Trends & Future Opportunities**
- **Innovative Distribution Models:** Which are Working and Which Are Not
- How to Structure an **Investment using a PPLI Policy** to Achieve the Desired Results
- Latest **International Insurance Regulatory Developments**
- **Wealth Planning** for UK Resident HNWI's
- **Inheritance Tax** Exposure Resulting from Owning UK Real Property: Available **Insurance Solutions** Plus Other **Recent Product Developments**
- Private Placement Insurance **"Blockers" for US Investments**
- **Tax Effects of Mis-selling Insurance Structures:** Overcoming Resulting Tax Disclosure Issues
- **PPLI/PPVA as Tax-Driven Products** Maximising Tax Efficiency for Your Clients

Conference Sponsor



Organised By:

IBC Global Conferences
Investing business with knowledge

Grange City Hotel, London
20 May 2014

**Register
Today!**

Call: +44 (0) 20 7017 7790 Fax: +44 (0)20 7017 7824
E-Mail: kmregistration@informa.com
For Latest Programme & To Register:
www.ibc-events.com/privateclientinsurance

Private Placement Life Insurance (PPLI)

09:00 Chair's Welcome & Opening Remarks
**PPLI and PPVA Market:
Current Trends & Future Opportunities**



Joseph Field
Of Counsel
WITHERSWORLDWIDE

09:45 **Innovative Distribution Models:
Which are Working and Which Are Not**

- Distribution and needs based selling
- PPLI and PPVA delivery models: how effective is each model in practical terms
- Carrier versus broker distribution models: how important is an independent view of the marketplace
- Partnerships/collaborations towards successful distribution: identifying partners with scalable distribution models



Grayson Dufrene
Managing Director
VIE INTERNATIONAL

10:30 Networking Break & Refreshments

11:00 **How to Structure an Investment using
a PPLI Policy to Achieve the Desired
Results**

- Who is a US Taxpayer?
- Structuring the investment vehicle: Insurance-Dedicated Fund (IDF) versus Managed Separate Account
- Structuring the PPLI product:
 - non-MEC
 - MEC
- How do you incorporate different products into your various clients' situations



Tom Bounty
Partner
GSRP

*"Interesting, informative
and illuminating"*
J Hunter, RBC Trustees (Guernsey) Ltd

11:45 **Latest International Insurance
Regulatory Developments**



*Key Financial Regulations & Compliance
Considerations*

- International insurance: the evolving regulatory regimes
- Offshore product regulatory compliance considerations
- Designing products for international markets: insurance, securities and tax implications
- Customer identification programs and USA Patriot Act
- Compliance with anti-corruption and economic sanctions restrictions



Thomas Morante
Partner
HOLLAND & KNIGHT



Jonathan Epstein
Partner
HOLLAND & KNIGHT

12:30 Networking Lunch

13:45 **Wealth Planning for UK Resident HNWI's**

- Drivers (Tax and Non Tax)
- Why use structures?
- Trusts and alternative structures including offshore bonds
- Future proofing



Jeremy Franks
UK Head of Wealth Planning Advisory
UBS WEALTH MANAGEMENT

14:30 **Inheritance Tax Exposure Resulting from
Owning UK Real Property:
Available Insurance Solutions Plus Other
Recent Product Developments**

- Annual Tax on Enveloped Dwellings planning
- Avoiding remittances on premium payments
- Innovative products within the realm of private client insurance



Brent Vanderbrook
CEO
W LIFE ASSURANCE COMPANY

15:15 Networking Break & Refreshments

PPLI) and Annuities (PPVA) 2014

15:35 Private Placement Insurance “Blockers” for US Investments

- The use of “blockers” by investors in US assets
 - Effectively connected income
 - Unrelated Business Taxable Income (UBTI)
 - FIRPTA (Real Property)
 - Foreign Governments
 - FATCA
- Typical blockers
 - Offshore Corporations
 - REITs
 - US partnerships and LLCs
- Insurance policies used as blockers
 - Annuities
 - Life Insurance



Perry Lerner
CEO and Chair
CROWN GLOBAL INSURANCE GROUP, LLC

16:05 Tax Effects of Mis-selling Insurance Structures: Overcoming Resulting Tax Disclosure Issues



- Common types of misselling
- IRS voluntary disclosure
- The Liechtenstein Disclosure Facility for the UK
- Other EU disclosure facilities

Chair:



Mark Summers
Partner, Head of International Private Client,
Zurich
SPEECHLY BIRCHAM AG



Brent Vanderbrook
CEO
W LIFE ASSURANCE COMPANY



William Jean-Baptiste
Senior Associate
SPEECHLY BIRCHAM

16:50 PPLI/PPVA as Tax-Driven Products Maximising Tax Efficiency for Your Clients



- Private placement insurance contracts as a tax planning tool
- Private placement insurance options, related investment and tax planning issues
- Disclosure
- Tax agreements and amnesties
- Tax transparency / information exchange
- International transfer of clients

Chair:



Joseph Field
Of Counsel
WITHERSWORLDWIDE



Wayne Johnson
Partner
JOHNSON, GIORDANO & ROTH, APC

17:35 Chair's Closing Remarks

17:40 Conference Adjourns

17:45 Drinks Reception

Working with IBC

Proactively reaching new clients should be a priority. Marketing your organisation at the 5th Private Placement Life Insurance (PPLI) and Annuities (PPVA) is a compelling way to communicate your firm's unique expertise, ability to provide solutions and heighten industry awareness of your firm's brand to senior professionals. We tailor sponsorship and exhibition packages specifically to help you meet and influence the people who are going to ensure the continued growth and success of your business now and in the future.

For more details on current opportunities please contact

Max Tattersall on +44 (0)20 7017 4673
or email max.tattersall@informa.com

Conference Sponsor:



W Life provides custom life assurance solutions for use in international wealth planning. W Life's policies integrate with and provide inheritance tax planning, wealth creation, liquidity needs and tax efficient investing possibilities. Bringing together an expertise in the disciplines of insurance and tax planning, W Life offers solutions to manage and sustain wealth. W Life works closely with leading international reinsurers for policy capacity and with select private banks, fund managers, family offices, financial and tax advisers to design and implement life assurance solutions. Policies are issued by W Life Assurance Company (Bahamas) SAC Ltd.

What past attendees said about recent IBC's private client events:

"The conference combined talks and seminars which balances academic substance with commercial practicality" (Farrer & Co)

"A very thorough set of lectures that really drilled in to detail that could often be over looked" (Thomas St. John)

"Very good quality speaker and informative presentations, both in terms of technical details and personal insights" (Berwin Leighton Paisner)

Private Placement Life Insurance (PPLI) and Annuities (PPVA) 2014

Grange City Hotel, London, 20 May 2014

VIP CODE

FKW52744EMSPK

Please quote the above VIP code when registering

20% Discount - VIP Code FKW52744EMSPK

FIVE EASY WAYS TO REGISTER



Telephone:
Tel: +44 (0)20 7017 7790
Please remember to quote
FKW52744



Web: [www.ibc-events.com/
privateclientinsurance](http://www.ibc-events.com/privateclientinsurance)



Fax:
Complete and send this
registration form to:
Fax: +44 (0)20 7017 7824



Mail:
this completed form
together with payment to:
Nicola Rogers
Informa Customer Services
PO Box 406, West Byfleet
Surrey KT14 6WL, UK



Email:
kmregistration@informa.com

Payment should be made within 14 days of registration. All registrations must be paid in advance of the event. When registering, please quote your VIP code - found in top right hand corner of this booking form.

HOW MUCH?

	Register by 7 March 2014	SAVE	Register by 17 April 2014	SAVE	Register after 17 April 2014
1 Day Conference	£799 + VAT @ 20% = £958.80	£200	£899 + VAT @ 20% = £1078.80	£100	£999 + VAT @ 20% = £1,198.80

50% Discount for 3rd and subsequent delegates. The VAT rate is subject to change and may differ from the advertised rate. The amount you are charged will be determined when your invoice is raised. Savings include Multiple Booking & Early Booking Discounts. All discounts are subject to approval. Please note the conference fee does not include travel or hotel accommodation costs. 50% Discount for 3rd and subsequent delegates. All discounts can only be claimed at the time of registration and multi-booking discounts cannot be combined with other discounts that may be available (apart from early booking discounts which are available to everyone). We are happy to accept a replacement delegate for the whole event, however delegate passes cannot be split or shared between delegates under any circumstances.

THREE EASY WAYS TO PAY

- Cheque: Enclosed is our cheque for £ in favour of IIR UK Ltd
Please ensure that the Reference Code **FKW52744** is written on the back of the cheque
- By Bank Transfer: Full details of bank transfer options will be given with your invoice on registration.

To make payment by credit card: To ensure we provide the highest level of security for your credit card details we are unable to accept such payments via email or fax, which ensures that these details are never stored on our network. To make payment by credit card on-line, please enter your credit card details in our secure payments website that you will use when making your booking via the event website (the event web address is near the top of the booking form). Alternatively call our customer service team on +44 (0) 20 7017 7790.

Additional Requirements Please notify Informa at least one month before the conference date if you have any additional requirements e.g. wheelchair access, large print etc.

TERMS AND CONDITIONS Attendance at this Event is subject to the IBC Legal Delegate Terms and Conditions at <http://www.iirbctfinance.com/page/termsandconditions> Your attention is drawn in particular to clauses 6, 8 and 14 of the IBC Legal Delegate Terms and Conditions which have been set out below.

Cancellation Policy: If you cancel in accordance with this policy, you will receive a refund of your fees paid to IBC Legal (if any); (i) if you cancel your registration 28 days or more before the Event, subject to an administration charge equivalent to 10% of the total amount of your fees plus VAT; or (ii) if you cancel your registration less than 28 days, but more than 14 days before the Event, subject to an administration charge equivalent to 50% of the total amount of your fees plus VAT. IBC Legal regrets that the full amount of your fee remains payable in the event that your cancellation is 14 days or less before the Event or if you fail to attend the Event. All cancellations must be sent by email to professionalcustomers@informa.com marked for the attention of Customer Services and must be received by IBC Legal. You acknowledge that the refund of your fees in accordance with this policy is your sole remedy in respect of any cancellation of your registration by you and all other liability is expressly excluded.

Changes to the Conference: IBC Legal may (at its sole discretion) change the format, speakers, participants, content, venue location and programme or

any other aspect of the Event at any time and for any reason, whether or not due to a Force Majeure Event, in each case without liability.

Data protection: The personal information which you provide to us will be held by us on a database. You agree that IBC Legal may share this information with other companies in the Informa group. Occasionally your details may be made available to selected third parties who wish to communicate with you offers related to your business activities. If you do not wish to receive these offers please contact the database manager. For more information about how IBC Legal use the information you provide please see our privacy policy at <http://www.iirbctfinance.com/page/privacypolicy> If you do not wish your details to be available to companies in the Informa Group, or selected third parties, please contact the Database Manager, Informa UK Ltd, Maple House, 149 Tottenham Court Road, London, W1T 7AD. Tel: +44 (0)20 7017 7077, fax: +44 (0)20 7017 7828 or email integrity@iirttd.co.uk

Incorrect Mailing: If you are receiving multiple mailings or you would like us to change any details, or remove your name from our database, please contact the Database Manager at the above address quoting the reference number printed on the mailing label.
By completing and submitting this registration form, you confirm that you have read and understood the IBC Legal Delegate Terms and Conditions and you agree to be bound by them.

WHEN AND WHERE

FKW52744
London, 20 May 2014

Venue: Grange City Hotel
8-14 Cooper's Row
London EC3N 2BQ
Tel: +44 (0) 20 7863 3700
Fax: +44 (0) 20 7863 3701
www.grangehotels.com

Delegates are responsible for the arrangement and payment of their own travel and accommodation. Informa has arranged a special room rate at a number of hotels. If you wish to book a room, please call Venue Search on +44 (0)20 8546 6166 or if you prefer you can email them at beds@venuesearch.co.uk.

PERSONAL DETAILS

1st Delegate Mr/Mrs/Ms

Job title _____ Department _____
Telephone _____ Fax _____
Email _____

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving ONLY Informa companies the permission to contact me by email

2nd Delegate Mr/Mrs/Ms

Job title _____ Department _____
Telephone _____ Fax _____
Email _____

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving ONLY Informa companies the permission to contact me by email

3rd Delegate Mr/Mrs/Ms

Job title _____ Department _____
Telephone _____ Fax _____
Email _____

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving ONLY Informa companies the permission to contact me by email

Name of your Line Manager Mr/Mrs/Ms

Job title _____ Department _____
Telephone _____ Fax _____
Email _____

Booking Contact Mr/Mrs/Ms

Job title _____ Department _____
Telephone _____ Fax _____
Email _____

COMPANY DETAILS

Company Name _____
Postal Address _____

Telephone _____ Fax _____
Nature of Business _____

Billing Address (if different from above address) _____

Billing E-mail Address: _____

Unable to attend - event documentation
Nothing compares to being there but you need not miss out! To order your online documentation simply tick the box, complete your details above and send the form along with payment.

(PPLI) and Annuities (PPVA) 2014 £225 (+ VAT @ 20%)

Documentation orders can only be processed on receipt of credit card details. To ensure we provide the highest level of security for your credit card details we are unable to accept such payments via email or fax, which ensures that these details are never stored on our network. To make payment by credit card: To make your payment on-line, please enter your credit card details in our secure payments website that you will use when making your documentation purchase via the event website (the event web address is near the top of the booking form). Alternatively call our customer service team on +44 (0) 20 7017 7790 or email your phone number with your documentation order to kmregistration@informa.com and we will call you.