10TH ANNUAL ESTATE PLANNING SYMPOSIUM

epcmiami.org

2022 VIRTUAL VIA ZOOM

Tuesday, February 8th, 2022, 9:00 am - 5:00 pm

MEET OUR SPEAKERS

Common Mistakes and Tips for International Trust and Estate Tax Planning Clients

Jennifer Wioncek & Paul D'Alessandro - Bilzin Sumberg - **9:15 am - 10:05 am**

Jennifer Wioncek is head of Bilzin Sumberg's Tax & Private Wealth Services group. Jennifer advises high-net-worth individuals and family offices on both domestic and international trust and estate planning matters, multijurisdictional estate administration matters, acquisition, maintenance, and sale of U.S. real estate by foreigners. Jennifer also handles pre-immigration planning, and expatriation planning. Jennifer is a Fellow with the *American College of Trust and Estate Counsel* (ACTEC), active speaker in the community, and an adjunct professor at the University of Miami School of Law Tax LLM program, where she teaches multiple classes in the area of trust and estates.

Contact: jwioncek@bilzin.com 305.350.7238

Paul J. D'Alessandro, Jr. is a partner in Bilzin Sumberg's Tax & Wealth Services group. Paul advises high net worth clients and global families on a variety of international tax and estate planning issues. Paul's experience includes advising U.S. and foreign clients on domestic and foreign trusts and related tax and estate planning considerations, pre-immigration tax and estate planning, expatriation issues, and structuring considerations for foreign investment in U.S. real estate, private equity funds, and business interests. In 2021, Paul was named a "Florida Rising Star" by Florida Super Lawyers and recognized as part of Best Lawyers "Ones to Watch" class of attorneys.

Contact: pdalessandro@bilzin.com 305.350.7246

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US Tax Planning for Nonresident Entrepreneurial Families

Michael Bruno & Melissa Price - McDermott, Will & Emery - **10:10 am - 11:00 am**

Michael Bruno focuses his practice on domestic and international tax planning for multinational companies, funds, and entrepreneurial families. He regularly advises entrepreneurial families on strategies for minimizing US income taxation with respect to their closely held businesses and investments. Michael also regularly advises entrepreneurs on qualified small business stock (QSBS) planning.

Contact: mjbruno@mwe.com 305.347.6504

Melissa M. Price focuses her practice on domestic and international estate planning. She advises clients on estate, gift, and income tax issues, wealth transfer techniques, trust and estate administration, and charitable planning. Melissa has significant experience with cross-border matters, including tax considerations for U.S. beneficiaries of foreign trusts, pre-immigration and expatriation planning, and pre and post-death planning for foreign individuals with U.S. family members.

Contact: mmprice@mwe.com 917.284.3153

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Hot in Here: Inflation's impact on the markets
Steve Chiavarone - Federated Hermes - **11:10 am - 12:00 pm**

Steve Chiavarone is responsible for portfolio management and research in the global asset allocation area at Federated Hermes. He assists in the formulation of Federated Hermes' views on the economy, the financial markets and investment positioning strategies as a member of both the Macro Economic Policy and the PRISM Asset Allocation committees. Steve is also responsible for bringing macroeconomic, investment strategy and product knowledge to clients as a frequent speaker at industry conferences and a regular contributor across the financial media. He joined Federated Hermes in 2007 and has more than 15 years of industry experience.

Contact: steve.chiavarone@federatedhermes.com 212.905.4830

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Estate Planning Tax Update

Mark Brown & Christopher Weeg - Comiter Singer, Baseman & Braun - **12:45 pm - 1:35 pm**

Mark R. Brown, a partner with Comiter, Singer, Baseman & Braun, concentrates in the areas of wills and trusts, domicile planning, probate administration, and sophisticated estate, gift and generation-skipping transfer tax and income tax planning. Mr. Brown is board certified as an expert in both Tax Law and Wills, Trusts & Estates by the Florida Bar Board of Legal Specialization and Education. He is also licensed as a Certified Public Accountant in Florida. Mr. Brown earned his B.S. degree, summa cum laude, in accounting from the State University of New York at Albany and his J.D. degree from Duke University School of Law. Mark is the Chair Elect of the Tax Section of the Florida Bar, and Past President of both the East Coast Estate Planning Council and Palm Beach Tax Institute.

Contact: mbrown@comitersinger.com or 561.626.2101

Christopher C. Weeg is an attorney and a CPA with a focus on tax and estate planning. As a triple Gator, Chris graduated from the University of Florida with an accounting degree, J.D., and an LL.M. in taxation. While in law school, Chris was a member of the Law Review and was inducted into the Order of the Coif. Chris worked at a tax boutique law firm in Dallas before joining Comiter Singer. Prior to law school, he worked in the tax department of a public accounting firm in West Palm Beach. Chris is admitted to practice law in Florida and Texas and is also a licensed CPA in both states.

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2021 Case Law Update
Eric Virgil - The Virgil Law Firm - **1:40 pm - 2:30 pm**

Eric Virgil is a member of The Florida Bar and the North Carolina State Bar. He is a Fellow of the American College of Trust and Estate Counsel and is active in both the Real Property, Probate, and Trust Law Section and the Elder Law Section of The Florida Bar. Eric is the past Vice-Chair of the Guardianship Practice and Advanced Directives Committee of the RPPTL Section. Eric is also the past chair of the Dade County Bar's Probate and Guardianship Committee. He has lectured before many groups on trust, estate, and guardianship matters and related topics.

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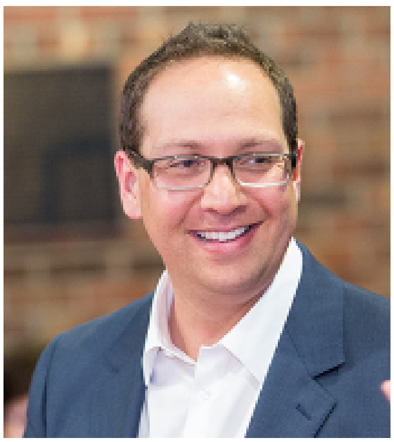
The Life Insurance Goes Right Here!
Eric Eklund - Jones Lowry - **2:35 pm - 3:25 pm**



Eric Eklund, Esq. is the Senior Director of Advanced Planning at Jones Lowry. Prior to joining the firm, he was responsible for Advanced Markets strategies at M Financial Group advising the nation's top life insurance professionals on business planning, estate planning, tax planning. During his time at M, Eric oversaw internal government affairs and served on the Federal and State Legislative Task Force and Income Tax Committees for the American Council of Life Insurers (ACLI). Prior to joining M Financial, Eric was in private practice at a boutique law firm handling trust and estates, tax, and business planning for High-Net-Worth clients.

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The Genesis Block: An introduction to blockchain, cryptocurrency, NFTs, and more
Paul Bances & Liam Digregorio - PayPal - **3:30 pm - 4:20 pm**

Paul Bances is the Head of Market Development for PayPal's new Blockchain, Cryptocurrency, and Digital Currency Business Unit. Prior to the creation of the new business unit, Paul was part of PayPal's strategic Global Business Development team, spearheading PayPal's entry into cryptocurrency. Before entering the blockchain and cryptocurrency sector, Paul was a payments and financial services attorney specializing in digital payments, e-money, and cross-border remittances.

Contact: pbances@paypal.com

Liam Digregorio has been in the blockchain space since 2017 working across educational, technical, and strategic roles to bring blockchain and crypto mainstream. Previously with the Blockchain Research Group at PayPal, Liam is now part of the Market Development team working to expand PayPal's crypto offerings.

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