



IN ASSOCIATION WITH



Wednesday, 27 September 2017

18:30 to 21:30 – Program starts at 19:00

Eglise francais / French Church Corner of Schanzengasse 25 / Promenadengasse, Zurich

- A) Take Bus 31 (Bus stop in front of McDonald's (Bahnhofplatz) next to Bahnhofstrasse) and get off at Sprecherstrasse. Or
- B) Take S Bahn train (Tracks 43 or 44) from ZH HB to ZH Stadelhofen. Walk up and over tracks to the Gymmi school and get on Schanzengasse street.

On-line Registration is preferred:

1. **Please register in advance – No Charge for ACA Members who register in advance, US \$30 per person online registration for non-members. Register at:**
<https://www.americansabroad.org/events/3/>
2. **Donation at the door is CHF 35 per person for anyone who has not registered**
3. **For further information please contact: julie.sanford@americansabroad.org**
Limited non-reserved seating Please register as soon as possible

The ACA Global Foundation ("ACAGF") is the sister organization of American Citizens Abroad, Inc. ("ACA"), which supports education and research on issues affecting Americans abroad.

Disclaimer: ACAGF and ACA are not responsible for any advice given at this event

TOWN HALL EVENING ZURICH

IRS Tax Code Developments under the Trump Administration

Financial and Retirement Challenges for US Citizens Abroad

Last Will and Testament Issues for US Persons in Switzerland

KEY TOPICS:

1. What's new and expected for 2017 and beyond in the IRS Tax Code under the Trump Administration, and how do these changes impact US tax filers living abroad
2. As an American in Switzerland, what can or should I do in terms of estate planning: last will, living will, power of attorney, prenup, etc.?
3. Retirement concerns for Americans wishing to retire in Switzerland or in the US
4. Financial planning and banking issues for Americans overseas
5. What is ACA and how it helps Americans overseas
6. Over an hour of Q & A time

The Speakers are:

Milan Patel

Milan is a US attorney and former IRS senior trial attorney. He advises clients in US related cross-border tax, trust, estate, and succession planning matters and controversies. Milan is a founding partner and co-head of the US group at Anaford AG, an international boutique law firm headquartered in Zurich

Tobias Somary

Tobias is a Swiss attorney specializing in international estate & succession planning and inheritance disputes. Tobias is a partner at CMS Switzerland. He heads the private client practice of the law firm and the inheritance chapter of the Zurich Bar Association.

Margaret Conklin – CPA

Margaret is a Switzerland based US tax advisor. She is a CPA with a Master of Taxation degree from University of Southern California. She works with numerous US citizens, tax residents and foreign nationals with their US tax compliance issues.

Jonathan Lachowitz – CFP®

Jonathan is a Board Member of ACA; Certified Financial Planner in the US and Switzerland and owner of White Lighthouse Investment Management in Lausanne and Lexington, MA. Jonathan has written extensively on personal finance for the Wall Street Journal.