

TOWN HALL EVENING ZURICH

IRS Tax Code Developments
Financial and Retirement Challenges for US Citizens Abroad
Last Will and Testament Issues for US Persons in Switzerland

WEDNESDAY, 21 SEPTEMBER 2016

18:30 to 21:30

EGLISE FRANÇAISE, Schanzengasse 25, 8001 Zurich

- From ZH Stadelhofen, walk up and over tracks to Gymnasium Stadelhofen and get on Schanzengasse street, or
- Take Bus 31 from HB to Sprecherstrasse

On-line Registration is preferred:

1. Please register in advance - US \$30 per person online registration at:
<https://www.Eventbrite.com/e/town-hall-evening-zurich-tickets-25860532549>
2. Donation at the door is CHF 35 per person
3. For further information please contact: Christian Fuchs/swissfox5@yahoo.com

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

KEY TOPICS:

1. Financial planning and banking issues for Americans overseas
2. As an American in Switzerland, what can or should I do with respect to writing a Last Will & Testament
3. What's new for 2016 in the IRS Tax Code, and how do these changes impact US tax filers living abroad
4. Retirement concerns for Americans wishing to retire in Switzerland or in the US
5. What is ACA and how it helps Americans overseas
6. Over an hour of Q & A time

The Speakers are:

Daniel Hyde

Daniel is a chartered tax advisor and agent enrolled to practise in front of the IRS. An active speaker regarding US tax matters, particularly those related to US entrepreneurs and financial services, Daniel is a founding partner at the firm Westleton Drake Tax Advisors

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.

Jonathan Lachowitz

Jonathan is a Board Member of ACA and the Swiss Financial Planning Organization; Certified Financial Planner in the US and Switzerland and owner of White Lighthouse Investment Management in Lausanne

WHEN

Wednesday, September 21, 2016 from 6:30 PM to 9:30 PM (CEST) -

WHERE

EGLISE FRANÇAISE - Schanzengasse 25, 8001 Zurich, Switzerland -