

# London & Capital

## US Family Office

Strategic financial planning for US families since 1989

### COMPLIMENTARY SEMINAR

We would like to invite you to attend our US Family Office seminar, in association with Kellogg and Yale Alumni Clubs.

**Tuesday 12 November 2013**  
at **London & Capital offices**  
7 Triton Square  
Regent's Place  
London  
NW1 3HG

Program  
**18.30** Drinks reception  
**19.00** Presentation and Q&A  
**20.00** Post-seminar networking

## Estate and inheritance tax planning considerations and opportunities for US linked families in the UK

### Key themes & highlights

- US/UK wills
- QDOT's
- Ownership of property
- US/UK mix spouses - estate planning considerations
- US trusts/UK trust planning
- Inheritance tax planning

R.S.V.P. by Tuesday 29 October  
[david.kosky@londonandcapital.com](mailto:david.kosky@londonandcapital.com)



## About the seminar

London & Capital along with Withers and Deloitte, and in association with Kellogg and Yale Alumni Clubs, would like to invite you to a complimentary seminar for Americans living and working in the UK on planning your financial affairs.

To reserve your place please email:  
david.kosky@londonandcapital.com

### About London & Capital

London & Capital is an independently-owned, international wealth management firm established in 1986 with offices in London and Hong Kong. With a client base as international as our investment outlook we provide intermediaries, private individuals and institutional investors across the globe with expert advice on offshore and onshore investment strategies. Our focus is on capital preservation - which aims to achieve consistent, positive returns over the longer term. Having worked closely with the non-dom community for many years and in particular those US citizens currently residing in the UK, our wealth of experience in these areas enables us to provide tailored, practical, investment solutions.

### About Withers

Withers is the first international law firm dedicated to the business, personal and philanthropic interests of successful people, their families and advisers. With offices in London, New York, New Haven (Connecticut), Hong Kong, BVI, Geneva, Milan, and Greenwich (Connecticut), the firm is known as Withers LLP in Europe, Withers Bergman in the US and Withers in Hong Kong. Withers provides integrated answers to the US, UK and international legal and tax needs of its high-net-worth clients, whether this means restructuring their own assets, buying or selling

businesses and properties, coping with divorce, termination of their employment, or setting up charitable business foundations. Withers has one of the largest teams of specialist US private client lawyers in Europe, and more Italian speakers than any other City law firm.

### About Deloitte

In the UK, Deloitte LLP offers professional services to the UK and European market from offices in 23 locations throughout the UK and approximately 11,500 staff and partners in the UK and Switzerland. We provide professional services and advice to many leading businesses, government departments and public sector bodies, and publish many influential studies and thought leadership pieces. Deloitte LLP is the United Kingdom member firm of Deloitte Touche Tohmatsu Limited ("DTTL"), a UK private company limited by guarantee, whose member firms are legally separate and independent entities. DTTL is represented in 147 countries, with over 54 member firms and approximately 169,000 staff.

## The speakers

### Tony McLoughlin Director London & Capital US Family Office

Tony has been working in partnership with international private clients and their advisers for over 28 years, particularly in North America and the Caribbean. One of his key achievements for London & Capital is to have successfully built dedicated areas of investment excellence within the investment team. Tony was also instrumental in the development of the Group's US operations. Tony is London & Capital's technical in-house investment expert on portfolio construction specifically relating to UK resident non-domiciled families and in particular to US citizens living in Europe.

### Chris McLemore Associate Withers

Chris joined Withers in 2007. Chris' expertise lies within US/UK tax planning, voluntary disclosure, and expatriation. He often advises on U.S. and international tax planning for individuals, trusts and estates. Additionally, he works closely with charities and foundations on charitable giving and structuring. Chris attended the University of Notre Dame Law School. He was named top collegiate public speaker in the US in 2000, and since then has appeared in numerous publications and attended presentations relevant to the field.

### Anna Chapman Tax Director Deloitte

Anna Chapman is a Director in the Deloitte US/UK High Net Worth group based in London. Anna is a qualified advisor in both the US and the UK and has over 15 years of experience advising on US and UK personal tax matters and the integration of the two regimes. Anna has extensive experience of advising High Net Worth Individuals on all aspects of international personal tax and estate planning. Anna works across all industry sectors but over recent years has spent a significant part of her time working with clients in the financial services sector.

withers <sup>LLP</sup>

Deloitte.

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