

STEP CANADA'S "CANADA/US CROSS-BORDER ESTATE PLANNING" COURSE

Speaking Engagement

March 6, 2023

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Congratulations to Carol Fitzsimmons, Leslie Kellogg, and Britta McKenna for their excellent work preparing the content for and presenting STEP Canada's "Canada/US Cross-Border Estate Planning" course which contained 8 hours of content. STEP is a global professional body, comprising lawyers, accountants, financial advisors and other practitioners that help high net worth families plan for their futures.

More than 450 people all across Canada participated in the course throughout its six-week run. The originally planned 5 courses sold out, so they were asked to do an additional encore presentation (which also sold out). Among the topics Carol, Leslie, and Britta presented were:

- Overview of US Income, Gift, and Estate Taxes
- Cross-Border Estate-Planning Design and Drafting
- Trusts, Trusts, and More Trusts
- Everyone's Worst Nightmare: The U.S. Anti-Deferral Rules
- In-Depth Cross-Border Pre-Mortem and Post-Mortem Planning Involving Corporations and Trusts
- Comings & Goings
- Canadians Who Winter in the United States

The topics are often complex and sometimes difficult, affecting many practitioners. But Carol, Leslie, and Britta delivered presentations that were not only detailed and in-depth, but also engaging and explained with simplicity.

The course was filmed at our office in Buffalo and the producer did an excellent job of showcasing the Guaranty Building and the City of Buffalo in the opening montage so it was great exposure for both the Firm and the City of Buffalo.

By all accounts, the presentations were wildly successful and well-received. Here is some of the feedback the ladies received:

Attorneys

Carol Fitzsimmons

Britta McKenna

Practices & Industries

International Trusts & Estates

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"This was one of the most useful and interesting courses I have ever taken in my 29-year career. The detailed information coupled with experiential examples of the presenters was exactly what I had hoped for. Thank you to all for your time and efforts."

"Best course that I've attended in many years; the presenters gave great practical comments which were very useful."

"This was one of the very best courses that I have attended in all of my career (the past 25 years)."

"I was very impressed by the knowledge level of each presenter and the very clear way in which they explained concepts."

Congratulations, ladies! We are proud of you!

