180602EveningTaxBriefing

**Evening Tax Briefing – An Evening Program for US Citizens Living in Germany**

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What: Members firms of the *Forum für Nachfolge- und Vermögensplanung e.V*. (FNV) have the pleasure to invite you to our highly informative event “Evening - Tax Briefing“ which will be followed by light refreshments and networking.

When: Tuesday, June 5, 2018 (1830-2130)

Where: Club Room, Münchener Herrenclub e.V., Brienner Strasse 13, 80333 Munich

Cost: Attendance is free of charge but the number of participants is limited.

Registration: Please register ASAP at: <https://muenchen.nachlassplaner.com>, Username: Muenchen, Password: 2018

Registration Cut-off: No later than Tuesday, 29th May 2018

Evening Schedule

6:00 p.m. Admission

6:30 p.m. Welcome – Dr. Peter Happe (GHM Partners, Köln, München, Zug)

6:35 p.m. Address of Welcome – Larry Schulz (American-German Business Club Munich e.V. (AGBC))

6:40 p.m. Briefings on the Subjects:

* Cornerstones of Taxation for U.S. Citizens – Dr. Johannes Mittermaier, GHM Partners
* Exit Tax for Germany / Exit Tax U.S. – Dr. Peter Happe, GHM Partners
* Qualifying Life Insurance with Investment Options – Cross-Border Aspects – Dr Daniel Welker, Lombard International Assurance S.A.
* Wealth Management and Financial Planning Locally and Cross-Border – Thomas Freiberger, Thomas Freiberger Vermögensverwaltung GmbH
* Implications of the Law of Succession and Inheritance Taxation of People with Dual-Citizenship in the light of the EU Regulation No. 650/2012 on Matters of Succession – Dr. Michael Stingl, Steinkrüger Stingl & Partner

7:40 p.m. Panel Discussion and Q&A – Moderation: Dr. Peter Happe (GHM Partners)

8:30 p.m. Networking and Refreshments

Forum für Nachfolge- und Vermögensplanung e.V. - FNV

The FNV association promotes independent financial and investment advisory services, as well as legal and tax advice, in particular in the field of succession and generational planning. With in-depth expertise, the member organizations provide banking and financial services, tax consulting as well as audit and legal services. All are staffed with professional experts with extensive experience in providing structured, tax-efficient and sustainable personal succession planning solutions.

The association provides publications and information while hosting events that include advice on how to avoid errors in the succession planning and implementation while minimizing investment risks and providing minimized investment risks. It also assists in evaluating legal and tax design options in creating and executing wills (Testaments) for individuals or families with family-owned companies. For legal reasons, the association itself may give no individual advice, but its member organizations are able to provide competent support.