

Retirement & Estate Planning

What are the Assets? **Where** are the Assets? **Who** owns the Assets?
Who Cares: The Family and Taxman!

The event takes place at the
Swiss Embassy
10th September 2015
18.30 – 20.30

To help you with this complex challenge, a special information event, initiated by **FOSSUK**, and jointly organised with the New Helvetic Society, the City Swiss Club, the Unione Ticinese, has been organised. **Entrance is free, but registration is essential.**

A panel of four will present on this topic, and from a UK and Swiss perspective, that will include UK Tax issues for Foreign Retirees, Swiss Tax and Pension Developments, HMRC approved trusts, and the UK Pension Act. In the end, the 'Tax Man' and our families care, so it is important to get the planning right.

Panel Members are:

Nicholas Niggli, Head of the Economic, Finance, Science and Innovation Section at the Swiss Embassy who will Chair and preside over the panel and moderate any questions and answers.

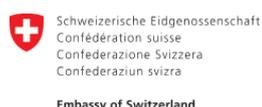
Christopher Coleridge Cole, Director at Gresham Street Partners and with over 36 years experience in the financial planning industry with a focus on UK-based expatriates. Benefits of establishing HMRC approved trusts will be presented.

Andrew Goodman, Partner in the Private Wealth team at Osborne Clarke, a UK Legal Firm and specialising in all aspects of personal tax and estate planning that includes bespoke trust and investment holding structures.

David Wallace Wilson, Partner with Schellenberg Wittmer's Private Clients and Estates practice based in Geneva, Switzerland. David advises individuals and families on wealth structuring and estate planning for personal and business assets.

A reception will follow the Retirement Event where more informal discussion can take place. We do look forward to sharing this important information with all of you.

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FOSSUK

Federation Of Swiss Societies
in the United Kingdom

Retirement & Estate Planning

Start to document your **estate** and **wishes** today, and not tomorrow, when it may be too late for the sake of you and your family.

Registration form

I/We would like to attend

Name(s):

Address:

Email:

Telephone:

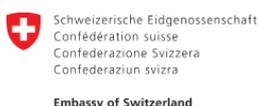
For Embassy security reasons applications have to be submitted by **5th September 2015**.
Do register early as spaces are strictly limited.

Replies to:

per post
Retirement Event
Lincoln House
75 Brookesley Street
E3 4QJ London

per email
secretary@swiss-societies.co.uk

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