TACKLING CROSS-BORDER PROBATE

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Outline/Description

This presentation will provide an overview of the common issues that arise with cross-border probate matters. The presentation will have a particular focus on practical strategies to help US clients navigate multi-jurisdictional issues that can arise upon the death of a non-US person. In addition, the presentation will provide guidance on how to issue spot and find effective solutions for US persons with interests overseas.

Topics will include: (i) an analysis of common inbound and outbound probate issues, (ii) practice tips for handling cross-border probate matters, (iii) an examination of how to comply with US and non-US tax laws, and (iv) pre-death planning pointers for clients likely to face multi-jurisdictional probate issues in the future. Participants can expect commentary applicable to private client advisers in a wide variety of professions and a practitioner's insight offered throughout.

Learning Objectives

After the presentation, participants should:

- be able to identify significant issues that may arise upon the death of a multi-jurisdictional client,
- understand common strategies to assist clients to efficiently navigate cross-border probate challenges, and
- have the tools to proactively assist clients to engage in pre-death planning to avoid common cross-border probate pitfalls.