Nevada Bankers Association

presents the 3rd Annual

NEVADA TRUST CONFERENCE

April 29-May 1, 2024

Caesars Palace

Las Vegas, NV

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LAUREL TRUST COMPANY

SEILER LLP CERTIFIED PUBLIC ACCOUNTANTS

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Own your tomorrow.

Welcome!

Thank you for participating in the 2024 Nevada Trust Conference. Nevada has a unique trust and wealth management environment, and Las Vegas is the perfect place to gather, learn the ins and outs, and separate myth from fact- all with the intention of enhancing participants' ability to provide the best advice for their clients trust needs.

The program provides a blend from local and national speakers on timely topics and considerations. There are also sessions that provide a deep look into critical subject matter such as QSBS, NINGS, the emerging field of digital assets, tax, SLATs, charitable assets and more.

This event would not be possible without the support of our sponsors, presenters and attendees. We appreciate each of you.

This event is organized and hosted by the Nevada Bankers Association with guidance from the Trust Conference Advisory Committee.

NEVADA BANKERS ASSOCIATION:

Phyllis Gurgevich, *President CEO*

Ana Castellanos, *Office Administrator*

Maria Velez, *Operations Coordinator & Member Engagement*

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Thomas J. Monroe, Esq. CFTA, President
Laurel Trust Company

With Special Thanks to:

Kelly Bayless, *Laurel Trust Company*

Wesley B. Earp, Trust Advisor, *Laurel Trust Company*

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Wells Fargo

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Seven Post Trust Company

Matthew Policastro, Esq., *Director-Trust Counsel*
Charles Schwab Trust Company

Ann Rosevear, J.D., *President & Chief Trust Officer*
Dunham Trust Company

GENERAL INFORMATION

SCHEDULE OVERVIEW:

Monday April 29
11:00 AM - Registration Open
1:00 PM - 2:00 PM Welcome & Nevada Trust Panel Presentation Neopolitan I
2:00 PM - 5:00 PM General Session Neopolitan I
5:00 PM - Opening Reception with Exhibiting Sponsors Neopolitan III

Tuesday April 30
7:30 AM - Breakfast with Exhibiting Sponsors Neopolitan III
8:30 AM - 11:30 AM General Session Neopolitan I
10:20 AM - 10:35 AM Break with Exhibiting Sponsors Neopolitan III
12:15 PM - 1:20 PM Lunch with Exhibiting Sponsors Neopolitan III
1:20 PM - 4:00 PM Concurrent Sessions
4:00 PM - 4:50 PM Ethics

Wednesday May 1
7:30 AM - Breakfast with Exhibiting Sponsors Neopolitan III
8:30 AM - 11:30 AM General Session Neopolitan I
10:20 AM - 10:35 AM Break with Exhibiting Sponsors Neopolitan III
12:15 PM - 1:20 PM Lunch with Exhibiting Sponsors Neopolitan III
1:20 PM - 4:00 PM Concurrent Sessions
4:05 PM - 4:55 PM Nevada Trust Company Panel Neopolitan I
4:55 PM - Closing Ceremony

WHO SHOULD ATTEND?
The Conference attracts accountants; attorneys; family office executives; professional trustee executives; and wealth planners seeking expert discussions on technical, legislative, and planning developments.

CONTINUING EDUCATION CREDIT
Earn up to 20 continuing education credits for public accounting, legal and wealth management certifications. Continuing legal education credit will be applied for in California, Nevada, and Utah. Materials detailing the presentations, including speaker biographies and presentation summaries, sufficient for self-reporting continuing education credit for CPAs will be provided. We are also seeking continuing education credit approval for CTFAs and CFPs. For past presentations by these presenters, continuing education credit has also been available for other credentials. If you are seeking continuing education credit for credentials other than those mentioned above, we urge you to reach out to the governing body of the applicable credential to determine if credit is available. We cannot guarantee that credit will be available in all cases or that the current year's field of study will be applicable to your area of specialty or valid continuing education for your credential.

CONFERENCE LEARNING OBJECTIVES:
Attendees will be provided with presentations, instruction and information that will further their understanding of the unique aspects of Nevada's trusts. Trust professionals will benefit from the conference learnings that will assure their trust clients receive the most timely, accurate and beneficial advice to meet their trust needs.

GENERAL INFORMATION

LEARNING OBJECTIVES: To educate and further the understanding of accountants, attorneys, fiduciaries, and wealth management professionals of the unique aspects of Nevada trust planning. This conference taught live by subject matter experts will ensure that the attendees' clients' receive timely, knowledgeable and beneficial advice to maximize their trust planning and legacy goals.

AT COMPLETION OF THIS CONFERENCE, YOU WILL BE ABLE TO: Have a current understanding of relevant federal tax laws changes that have occurred over the past twelve months; understand and mitigate ethical risks facing professionals; understand the operation and mechanics of a statutory decanting of a trust under Nevada law, as well as other forms of modification, such as a non-judicial settlement agreement; understand the advantages of Nevada law, in particular Nevada's creditor protection; understand Nevada self-settled spendthrift trusts and Nevada incomplete non-grantor trusts, and the state statutes that govern these trusts; apply best practice methods on satisfying client needs and trust administration; identify and apply current trends in Nevada trust planning to better serve existing clients and broaden trust knowledge, including consideration of both state and national trends; identify and avoid potential risks to trust clients and trust companies with regard to potential litigation, particularly in the fields of document drafting and review; analyze and identify potential issues with special assets, asset protection trusts, and international filing requirements for trusts; understand important considerations that should be considered when a client holds cryptocurrency; and understand current risks in fiduciary administration from leading practitioners in the state of Nevada.

PROGRAM CONTENT: Nevada's growing trust industry continues to make it the jurisdiction of choice for many individuals and institutions alike. The Nevada legislature, judiciary, and state officials have reinforced their commitment to the endurance and security of the trust industry in Nevada. The second annual Nevada Trust conference will gather both state and local experts to expound upon the advantages of doing trust business in Nevada.

PROGRAM LEVEL: Intermediate/Advanced

PROGRAM PREREQUISITES & ADVANCE PREPARATION: Those attending the conference will be from varied backgrounds and attendance is encouraged by all who work in the accounting, legal, trust, or wealth management spaces. Although not a requirement, many of our attendees and speakers hold the following educational or professional credentials J.D., CPA, CTFA, and CFP. The continuing education component of the conference will be appropriate to meet the requirements of the aforementioned credentials but may also be appropriate for others.

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Laurel Trust Company partners with our clients' team of advisors to pursue their strategic objectives, ensuring our collective approach aligns with their goals. We offer simplified sophisticated solutions for a diverse yet intimate roster of clients.

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AGENDA

Monday, April 29
11:00 a.m.
Registration and Check in
Lobby

1:00 p.m.
Welcome & First Session: Nevada Trust Panel
Discretionary Distribution Decisions
Neopolitan I

Jennifer Cuva
Charles Schwab Trust Company

Brandon Cintula
Peak Trust Company

Ryan Moser
Seven Post Trust Company

Susan Bull
Bryn Mawr Trust Company

Thomas Monro
Laurel Trust Company

Ann Rosevear
Dunham Trust Company

2:00 p.m.
Federal Tax Update
Neopolitan I

Sam Donaldson
Georgia State University

2:50 p.m.
Break with Exhibiting Sponsors
Neopolitan III

3:10 p.m.
The Nuts & Bolts of Fiduciary Accounting
Neopolitan I

Francine Lee
Ernst & Young LLC

4:00 p.m.
Intermediary Responsibility Around Third-Party Scams and Frauds
Neopolitan I

Benjamin Edwards
William S. Boyd Law School

5:00 p.m.
Opening Reception with Exhibiting Sponsors
Neopolitan III

Tuesday, April 30

7:30 a.m.
Breakfast with Exhibiting Sponsors
Neopolitan III

8:30 a.m.
Corporate Transparency Act's Impact on Trusts & Estates: An Early Christmas Fruitcake
Neopolitan I

Robert Armstrong
McDonald Carano

9:30 a.m.
From Trenches to Trends: Nevada Trust Law Legal & Legislative Updates
Neopolitan I

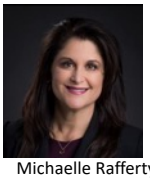
Alan Freer
Solomon Dwiggins Freer & Steadham

10:20 a.m.
Break with Exhibiting Sponsors
Neopolitan III

10:35 a.m.
2024 Update on Nevada Law Impacting Trusts & Estates
Neopolitan I

Alan Freer
Solomon Dwiggins Freer & Steadham

Robert Armstrong
McDonald Caran



Michaelle Rafferty
Maupin Cox & Legoy

11:25 a.m.
Dealing with Uncle Sam: Everyone's Least Favorite Relative in the Closely-Held Business
Neopolitan I

Sam Donaldson
Georgia State University

12:15 p.m.
Lunch with Exhibiting Sponsors
Neopolitan III

Tuesday, April 30 (Continued)
Concurrent Sessions
1:20 p.m.
Everything You Wanted to Know About Corporate Fiduciaries
Neopolitan I

Todd Hammond
Bryn Mawr Trust Company

Karen Sugihara
BNY Mellon Wealth Management

1:20 p.m.
Improving Your Odds. Selecting the Best Charitable Vehicle for Your Client's Goals
Pompeian II

Neil T. Kawashima
McDermott Will & Emery

Martin Hall
Hall & Diana, LLC

1:20 p.m.
U.S. Trusts in Int'l Tax Planning: Considerations with Respect to Multjurisdictional Settlors, Beneficiaries with Businesses
Pompeian I

Sean Tevel
Holland & Knight

Tuesday, April 30 (Continued)

2:15 p.m.
Advance Planning Strategies with Qualified Small Business Stock (QSBS)
Pompeian II

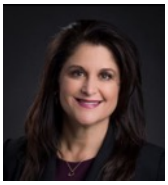
Raymond L. Thornson
Andersen

Joe P. Toce, Jr.
Andersen

2:15 p.m.
International Tax: Foreign Reporting Challenges by US Beneficiaries for Foreign Trusts
Pompeian I

Joe Fernandez
Seiler LLP

2:15 p.m.
Your Spouse's Boots Might Be Made for Walking… But Is Your Trust Walking Too?
Neopolitan I


Michaelle Rafferty
Maupin Cox & LeGoy

Concurrent Sessions
3:10 p.m.
Legacy Planning
Neopolitan I

Justin Miller
Evercore Wealth Management

3:10 p.m.
International Tax & Estate Planning for the HNW Mexican Family
Pompeian I

Enrique Hernandez
Procopio Law Firm

3:10 p.m.
State Income Tax & Trust Planning
Pompeian II

Naomita Yadav
Withers Bergman LLP

4:00 p.m.
Real World Ethical Scenarios in Trusts and Estates Practice
Neopolitan I

Benjamin Edwards
William S. Boyd Law School

Wednesday, May 1

7:30 a.m.
Breakfast with Exhibiting Sponsors
Neopolitan III

8:30 a.m.
Practical Partnership Solutions to Common Client Situations
Neopolitan I

Paul Lee
The Northern Trust Company of Nevada

9:30 a.m.
Naked Options & Other Exotic Wealth Transfers
Neopolitan I

David Handler
Kirkland and Ellis

10:20 a.m.
Break with Exhibiting Sponsors
Neopolitan III

10:35 a.m.
Reality Versus Scary Theory
Neopolitan I

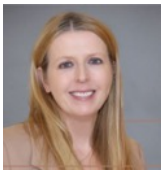
Louis S. Harrison
Harrison LLP

11:25 a.m.
SLATs: The Non-Marital Trust for Spouses
Neopolitan I

David Handler
Kirkland and Ellis

12:15 p.m.
Lunch with Exhibiting Sponsors
Neopolitan III

Wednesday, May 1 (Continued)
Concurrent Sessions
1:20 p.m.
Investment Strategies for Different Types of Trust, with Administrative & Fiduciary Considerations
Neopolitan I


Stacy Delich-Gould
Capital Bank & Trust

Timothy Riley
Aguirre Riley

1:20 p.m.
Digital & Regulatory: Why Crypto Belongs in a Bank
Pisa

Matthew Wolf
RSM – US LLP

Jay Schulman
RSM – US LLP

2:15 p.m.
Common Sense Proposals to Improve, Simplify & Correlate the U.S. Federal & State Income & Gratuitous Transfer Tax Laws
Pisa

Richard Kinyon
Shartis Friese LLP

Elizabeth Sevilla
Seiler LLP

2:15 p.m.
Are You Crossing the (Tax) Line?
Capri

Joseph Viviano
McDermott Will & Emery

Elise McGee
McDermott Will & Emery

2:15 p.m.
The Advantages & Challenges of Trust Planning When the Unexpected Happens I
Neopolitan I

Kristen Simmons
Simmons Freeman LLC

Ryan J. Works
McDonald Carano

Wednesday, May 1 (Continued)
Concurrent Sessions
3:10 p.m.
California Fiduciary Income Taxation & Throwback Tax
PIsa

Richard Kinyon
Shartis Friese LLP

Elizabeth Sevilla
Seiler LLP

3:10 p.m.
Are You Crossing the (Regulatory & Operational) Line?
Capri

Joseph Viviano
McDermott Will & Emery

Elise McGee
McDermott Will & Emery

3:10 p.m.
The Advantages & Challenges of Trust Planning When the Unexpected Happens II
Neopolitan I

Kristen Simmons
Simmons Freeman LLC

Ryan J. Works
McDonald Carano

4:05 p.m.
Nevada Trust Company Panel – Where the Rubber Hits the Road
Neopolitan I

Thomas Monroe
Laurel Trust Company

Ann Roesevear
Dunhum Trust Company

Ryan Moser
Silver Post Trust Company

Matthew Policastro
Charles Schwab Trust Company

4:55 p.m.
Closing Ceremony
Neopolitan III

Thank you for attending.
See you next year
April 21-23 | 2025

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Charles Schwab Trust Company (CSTC) provides corporate trustee services exclusively for Schwab's expansive network of branches, Financial Consultants, Wealth Advisors, and their clients. Acting both as a traditional, full-services trustee, or as a directed trustee under Nevada law, CSTC's structure allows professionals in this field to develop and maintain long-term relationships with trust clients while leveraging industry-leading securities custody, technology, and administrative expertise for the families they serve. Charles Schwab Trust Company is a wholly-owned subsidiary of The Charles Schwab Corporation. Visit our website at www.schwab.com/personal-trust-services.

Laurel Trust Company is a thoughtfully-driven professional trustee adept at streamlining complexity. We believe in putting our client's values and priorities first. We do this by providing solutions-oriented Trustee services and efficiently coordinating with our client's legal and investment advisors to pursue their strategic objectives. By using this collective approach, we ensure we align with our client's goals. We offer simplified sophisticated solutions for a diverse yet intimate roster of clients. Our directive, use good judgment, is a basic but paramount principle demonstrated with every decision we make. www.laureltrust.com

For 65 years, **Seiler** has provided advisory, tax, and accounting services to some of the world's most visionary and influential people, businesses, and non-profit organizations. Our clients include prominent philanthropic, business, and community leaders, as well as multi-generational families and entrepreneurs. We deliver the sophisticated solutions, innovative thinking, global capabilities, and highly personalized service our clients require to navigate the complexities of their financial worlds. #12

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- *San Francisco Business Times's* and *Silicon Valley Business Journal's* "Best Places to Work" for 2023, 2022, 2021, 2020, and 2017

ELIZABETH SEVILLA
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Partner

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Alliance Trust Company of Nevada works with professionals locally, nationally, and internationally to provide trustee services that benefit from Nevada's favorable asset protection and tax laws. Alliance is an independent trust company – not a subsidiary or affiliate of any brokerage house, insurance company, or bank. We offer flexible service including directed, delegated, and full fiduciary trustee services, as well as asset management. We Are Nevada.™. www.alliancetrustcompany.com #1

Since 2001, **BHG Financial** has originated more than $17 billion in loan solutions to top-quality borrowers, which community banks can purchase via the BHG Loan Hub. To date, over 1,600 bank partners have trusted in this program as a proven source of interest income and diversification for their bank. #2

Bryn Mawr Trust provides a variety of services designed to help ensure that your trust is efficiently administered to help grow, protect, and preserve wealth for future generations. At Bryn Mawr Trust we offer sophisticated, yet uncomplicated investment solutions tailored to address and meet our clients' needs and circumstances. Those who choose us as their corporate trustee enjoy the peace of mind of knowing that the organization they've come to trust and rely on will carry out their legacies in a professional & cost-effective manner. Our Nevada based team of trust officers and investment officers is specifically assigned to your trust. #3

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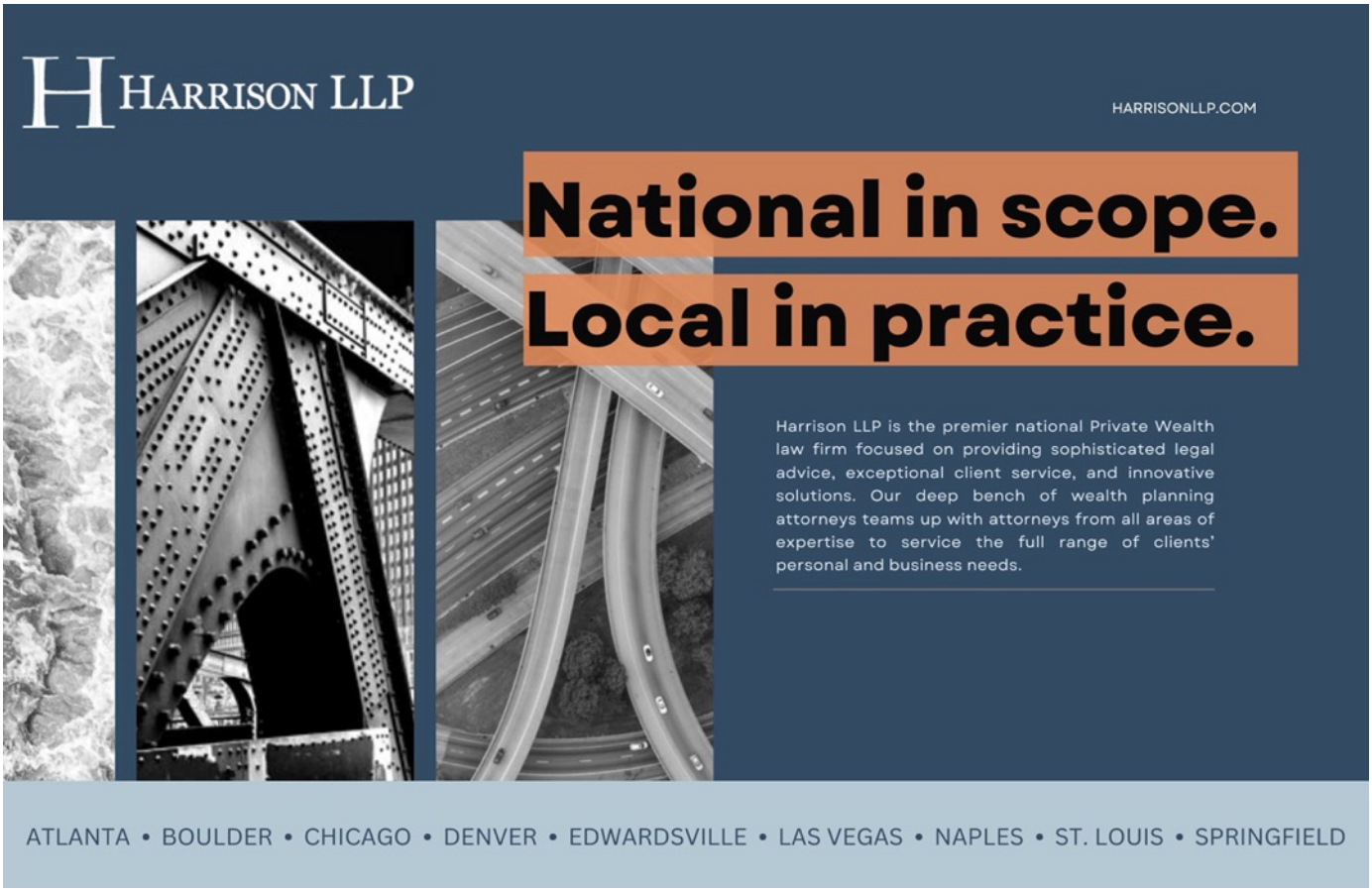

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Capital Group Private Client Services, a division of Capital Bank & Trust, is focused on helping our high-net-worth clients pursue their financial aspirations. We provide hands-on, personalized service backed by the resources of Capital Group, one of the world's oldest and largest asset management firms. Our singular focus is on investment management and wealth planning, allowing us to concentrate on delivering superior long-term results. #6

Cheetah Inc., a business unit of Accutech Systems Corp., provides software solutions for wealth managers focused on growing their business and building revenue. Cheetah Inc.'s mission is to provide wealth managers with the tools they need to grow their business, provide exceptional service, and increase operational efficiency. Cheetah Inc.'s flagship product, Cheetah, is a comprehensive platform that manages all aspects of a client's wealth, from trust accounting and tax reporting to investment management and trades. #7

Dunham Trust Company provides the professional trustee services you need to prepare for a confident and secure legacy for generations. We offer highly personalized service, experienced trust officers, and an independent approach to properly implement and administer your trust. www.dunhamtrust.com #8

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GBank (formerly known as “Bank of George”) (the "Bank"), is a wholly owned subsidiary of GBank Financial Holdings Inc., a bank holding company. Founded in 2007, the Bank operates two full-service commercial branches in Las Vegas, Nevada, with primary lending activities focused on engaging clients in Nevada, California, Utah, and Arizona. GBank has key businesses in three prominent divisions: SBA Lending, Gaming FinTech, and Commercial Lending. The Bank conducts business nationally through its SBA lending activities and its BankCard Services, LLC (“BCS”) partnership. Its Gaming FinTech Division, through its contract with BCS, is empowering Sightline Payments Play+ Solution (Sightline Payments) for seamless and secure pay-and-play that is enabling cashless, mobile commerce solutions for gaming, lottery, and sports betting ecosystems – positioning the Bank as a financial leader in this new payment’s world. It also provides general commercial banking services with an emphasis on serving the needs of small- and medium-sized businesses, high net worth individuals, professionals, and investors. Offers a full complement of consumer deposit products and is focused on delivering a premium level of service. GBank has been recognized every year for each of the past six years by S&P Capital IQ in its Top 100 Best-Performing Community Banks.

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Our Private Client Practice Group provides strategic, customized solutions to our clients' most sensitive and pressing needs. Serving as a trusted advisor across generations, we provide guidance and experience on estate and tax planning, fiduciary matters, business and family office structuring, succession issues, philanthropy and disputes.

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Harrison LLP is a national law firm focused on providing sophisticated legal advice, exceptional client service, and innovative solutions. With a deep bench of wealth planning attorneys teamed up with attorneys from all areas of expertise.

McDermott Will & Emery is one of the largest-grossing law firms in the United States and globally. Our Private Client & Wealth Management practice has extensive experience providing creative, customized solutions to our clients' most sensitive and pressing needs.

The attorneys at **Saltzman Mugan Dushoff** represent clients with business, licensing, and litigation matters in a variety of practice areas, including corporate law, liquor law, litigation and appellate law, bank and trust company law administrative law, employment law, health care law, securities law and creditors rights. Our Las Vegas business law firm is proud to represent local, national, and international business clients.

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FOR MORE INFORMATION CONTACT

Suan W. Tan
2nd Vice President – Trust Advisor
1700 S. Pavilion Center Drive, Suite 650
Las Vegas, NV 89135
702-304-6800

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Northern Trust is a preeminent global financial institution that provides asset servicing, investment management and wealth management services for institutions, high-net-worth individuals, and families. For more than 130 years, our success has been anchored in serving as our clients' most trusted financial partner, guarding, and growing their assets as though they are our own. We earn trust by staying true to our steadfast fiduciary heritage and providing differentiated, exceptional service tailored to clients' specific needs.

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President

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Crawford Trust Company, LLC - Led by Nevada trust company pioneer and veteran Greg Crawford, Crawford Trust specializes in complex estate planning and optimization. Leveraging Nevada's industry-leading trust and tax laws, Crawford Trust collaborates with attorneys, CPAs, financial advisors, insurance professionals, and directly with the families we serve in administering trusts per the terms of trust documents. We serve as Nevada trustee facilitating domestic and international families with multigenerational successive planning while preserving and protecting legacies under Nevada's robust trust and tax laws. Note: Currently, Crawford Trust Company cannot solicit or serve clients in the following areas of Nevada: Washoe Count, Douglas County or Carson City.

Dawson Lordahl Weisenmiller is a law firm focused on estate planning, probate, probate litigation, tax, and nonprofit law. Located in Southern Nevada, we provide legal and planning services to clients across the country who desire to use Nevada for their planning needs, and we frequently team up with trust companies and investment managers to accomplish the clients' many objectives.

Eide Bailly is a Top 25 business advisory and accounting firm, helping our clients embrace the opportunities that change, and innovation bring to the evolving business landscape and personal financial decisions. We offer our clients inspired ideas and solutions to tackle risk and spur growth. Eide Bailly's wealth planning professionals, bring knowledge from an array of specialty areas—business valuation, estate, trust and gift tax planning, financial planning—that provides a comprehensive approach to your wealth plan. Our goal is simple: We want to help you achieve your dreams.

Holland & Knight is a global law firm with approximately 2,200 lawyers and other professionals in 34 offices worldwide. The firm's lawyers and advisors provide representation in private wealth, litigation, corporate and finance, real estate, healthcare, and governmental matters.
With more than 100 lawyers, Holland & Knight's Private Wealth Services Practice is the largest estate planning group of any law firm in the United States and is focused almost exclusively on the needs of high-net-worth individuals and multigenerational families.

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Infovisa is a leader in trust accounting software. We develop applications that let trust accounting professionals focus less on running reports and more on providing counsel for their clients. Our flagship software, MAUI®, features an intuitive design and powerful, real-time reporting. Trust professionals can also customize MAUI using a robust set of modules, ensuring that the software is tailored to the needs of their department and their clients. We've built the most advanced trust accounting application from the ground up, using the constant input of industry pros. Our team is comprised of experts with decades of experience in the trust industry, and we're continuously improving every facet of MAUI. At Infovisa, we focus on you, so you can focus on your clients. That's Trusted Focus. #10

Lido's mission is to provide high-net-worth clients with comprehensive financial services and customized wealth management strategies once limited to the ultra-wealthy. Our family office style brings together robust in-house investment capabilities along with in-house and affiliated tax, trusts, estates, and financial planning professionals to support a holistic vision of each client's aspirations.

Maupin, Cox & LeGoy is one of Nevada's oldest and most respected law firms. We are a full-service law firm that has developed a national reputation for excellence, while at the same time preserving and cherishing our homegrown local roots. From long-time rural Nevada ranching families to Reno start-up technology companies, from sophisticated family trust companies to the young couple just starting a family, and from international Fortune 500 companies to the mom & pop storefront business, Maupin, Cox & LeGoy has the history, experience, and knowledge to provide the guidance and counsel you can rely on and trust. We are proud of our reputation and appreciate the continued opportunity to serve our clients, both within the great State of Nevada and beyond.

McDonald Carano has helped shape Nevada's legal, business and government landscape since our founding in 1949. With lawyers and government affairs professionals in offices in Reno, Las Vegas, and Carson City, we are positioned to help our clients achieve success throughout the State. Our talented and highly qualified professionals have an unparalleled ability to handle any client's needs while providing personalized service.

Nevada First Trust Company is organized as a Nevada State chartered trust company founded in 2022. Our affiliate, First State Trust Company has been serving personal and institutional trust clients for over 40 years. Dating back to its roots as E.F. Hutton Trust Company, FSTC & NFTC focus on strategic alliances with world-class financial service firms. NFTC is part of the Fi-Tek Group of companies, an organization with over 250 professional and technology experts across multiple states in the U.S. as well as a location in Asia. Fi-Tek provides innovative wealth management software products and world-class business solutions to financial services providers and their customers worldwide – supporting over 100 banks, trust companies and hedge fund clients.

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The company is a division of EdgeCo Holdings, LP, which collectively services over $150 billion in assets through NewEdge and its other custody and retirement businesses.
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We take the responsibility of giving back to our communities seriously. Over the past year, our people have actively participated in a variety of programs that provide support to organizations committed to making a difference in the places where we live and work.

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Simmons Freeman have years of experience in providing comprehensive, competent and caring counsel to clients in formulating and implementing an estate plan. Our Nevada Trust Lawyers are certified by the National Association of Estate Planners and Councils (NAEPC) as Estate Planning Law Specialists (EPLS) and Accredited Estate Planners (AEP). Both Kristen E. Simmons and Heidi C. Freeman have been named "Best Lawyers in America" for Trusts and Estates as well as Super Lawyers (Mountain States) for the years 2016-2020.

Solomon Dwiggins Freer & Steadman, LTD. is dedicated to representing clients throughout Nevada in estate and trust matters. The firm handles a wide range of legal issues involving trust and estate litigation, trust, and estate administration (probate), estate planning, asset protection, business litigation and tax disputes.

Wealthgate Trust (WGT) is a client-founded multi-family Nevada trust company that exclusively partners with UHNW families and their advisory team to create, implement, and administer bespoke trust strategies. Our founder – a practicing Trusts & Estates attorney and entrepreneur – created a trust company for families like his that desired a tailored, high-touch service executed by seasoned planning attorneys. WGT is an unparalleled solution for clients that require innovative planning and optimal flexibility while eliminating the cost and burden of creating and maintaining a PTC.

Withers, operating as **Withers Bergman LLP** in the US, is an international law firm dedicated to successful people, their businesses, and their charitable and philanthropic objectives. The firm has one of the largest private client tax practices in the world and has advised over 25% of the top 100 US Forbes list, 70% of the top 100 UK Sunday Times Rich List, as well as 35% of the Hong Kong Forbes Rich List. With over 180 partners and more than 450 other lawyers, we have extensive experience in commercial, tax, trusts, estate planning, financial services, litigation and arbitration, real estate, charities, philanthropy, employment, family law, digital assets and other legal issues facing individuals and their families.
Withers has 17 offices worldwide in London, New York, New Haven, Greenwich (Connecticut), Boston , Texas, San Francisco, San Diego, Los Angeles, Hong Kong, Singapore, Tokyo, the British Virgin Islands, Geneva, Milan, Padua and Cambridge.

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Robert Armstrong, Partner
McDonald Carano Law firm

Robert Armstrong is a third-generation Nevadan with unmatched expertise advising high net worth clients and family trust companies on Nevada's trust, estate and tax planning legal and regulatory landscape. Bob has over forty years of experience serving clients as an attorney and a non-practicing CPA. He is a Fellow of the American College of Trust and Estate Counsel and a member of the American Institute of Certified Public Accountants among other affiliations. Bob has received six "Lawyer of the Year" awards from The Best Lawyers in America and is currently ranked for the 5th consecutive year in the highest Band 1 category for Private Wealth Law in Chambers USA High Net Worth Guide. He received his juris doctorate from Georgetown Law Center and a LL.M. in taxation from New York University.

Stacey Delich-Gould, Senior Vice President, Senior Trust, and Estate Specialist
Capital Group Private Client Services

Stacey Delich-Gould is a senior trust and estate specialist for Capital Group Private Client Services, focusing on trust, estate, tax, and personal planning matters.
Before joining our firm, Stacey spent more than 10 years in private legal practice, most recently as a partner at Morrison Cohen LLP in New York. Stacey received her JD from New York University School of Law (cum laude), her LLM in taxation from New York University School of Law and her BA from Tufts University.

Stacey is the Chair of the Fiduciary Income Tax Committee of the ABA Section of Taxation, a member of the Estate and Gift Tax Committee, a registered TEP (of the Society of Trusts and Estates Practitioners) and in 2018 was elected a Fellow of the American Counsel of Trust and Estate Counsel (ACTEC). She also was named as a 2011-2012 John S. Nolan Fellow by the America Bar Association Section of Taxation. Stacey is a frequent speaker at various bar associations and professional organization meetings, and she sits on several nonprofit boards. Stacey is licensed to practice in New York and Connecticut. She is based in our New York office.

Samuel Donaldson, J.D. University of Arizona; LL.M. (Taxation) University of Florida
Professor of Law, Georgia State University

Sam Donaldson is a Professor of Law at Georgia State University in Atlanta. Prior to joining the Georgia State faculty in 2012, he was on the faculty at the University of Washington School of Law in Seattle for 13 years, where he served as the Director of the law school's Graduate Program in Taxation. While at the University of Washington, Professor Donaldson was a five-time recipient of the Philip A. Trautman Professor of the Year award from the School of Law's Student Bar Association. He teaches several tax and estate planning courses, as well as courses in the areas of property, commercial law, and professional responsibility. In addition to Georgia State and the University of Washington, Professor Donaldson has taught law school classes at Northwestern University, the University of Florida, and Emory University.

He is an Academic Fellow of the American College of Trust and Estate Counsel (ACTEC) and a member of the Bar in Washington, Oregon, and Arizona. He currently serves as the Tax Editor for the Probate Practice Reporter, a monthly publication from the University of South Carolina School of Law. Among his scholarly works, Professor Donaldson is a co-author of the popular law school textbook, Federal Income Tax: A Contemporary Approach, and a co-author of the Price on Contemporary Estate Planning reference volume published by Wolters Kluwer.

An amateur crossword constructor, his puzzles have been published in The New York Times, The Los Angeles Times, The Washington Post, The Wall Street Journal, and other outlets. A perennial contender for People Magazine's "Sexiest Man Alive" honor, Professor Donaldson was recently notified by email of his selection to receive substantial sums of money from high-level Nigerian business officials in exchange for his bank account information.

Benjamin Edwards, J.D.
Associate Professor of Law, William S. Boyd Law School

Benjamin Edwards joined the faculty of the William S. Boyd School of Law in 2017. He researches and writes about business and securities law, corporate governance, arbitration, and consumer protection. Prior to teaching, Professor Edwards practiced as a securities litigator in the New York office of Skadden, Arps, Slate, Meagher & Flom LLP. At Skadden, he represented clients in complex civil litigation, including securities class actions arising out of the Madoff Ponzi scheme and litigation arising out of the 2008 financial crisis. His writing has appeared in the Northwestern University Law Review, Washington and Lee Law Review, University of California Davis Law Review, Georgia State Law Review, William & Mary Law Review Online, Virginia Law and Business Review, Michigan Business and Entrepreneurial Law Review, Journal of Business and Securities Law, Virginia Journal of Social Policy and the Law, Investment News, Wall Street Journal, Salon, The Hill, The Washington Post, Bloomberg View, Oxford Business Law Blog, and Columbia Blue Sky Blog. He also writes regularly for the Business Law Professor blog.

Professor Edwards earned his law degree from Columbia Law School and clerked for Judge Samuel H. Mays, Jr. of the U.S. District Court for the Western District of Tennessee. Professor Edwards's most recent publications and working papers may be found on the Social Science Research Network.

Joe Fernandez, CPA, Partner
Seiler, LLP

Joe is a CPA with over 15 years of experience. He specializes in tax compliance and planning for high-net-worth individuals. He holds expertise in the several disciplines, including business tax planning and xcompliance for closely held domestic and foreign corporations; inbound transactions for foreign corporations, partnerships, and individuals; foreign tax planning and trust reporting; and nonresident alien assistance with complying with U.S. reporting requirements.

Joe joined Seiler in 2021. Prior to that, he worked at Holthouse Carlin & Van Trigt. He began his accounting career at Grant Thornton. Joe earned his Master's degree in Taxation and a Bachelor's degree in Accounting from Florida International University.

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PRESENTERS

Alan Freer, Partner
Solomon Dwiggins and Freer Steadman

Alan Freer is a member of the firm's management committee, where he focuses his practice primarily on trust and estate litigation. Alan also handles all aspects of trust and estate administration, and routinely represents beneficiaries and fiduciaries in contested matters. He has substantial experience in challenging and defending the validity of estate planning documents, including wills, codicils, trusts and amendments. Alan routinely prosecutes and defends claims for breach of fiduciary duty, fraud, undue influence, breach of trust, accounting, fiduciary removal, competency, lack of capacity, unjust enrichment, closely held business disputes and elder abuse.

Alan represents beneficiaries, fiduciaries, and grantors in contested matters from prelitigation case assessment and dispute negation to all stages of litigation, including trial and appellate practice. Additionally, he has represented fiduciaries in complex administrations, including multi-jurisdictional and international issues, sophisticated business succession plan implementation, bringing a litigation perspective to assess and implement intended plans. More recently, Alan has been actively engaged in the expanding area of domestic asset protection (spendthrift) trust litigation. He has represented creditors, beneficiaries, trustees, and grantors in both attacking and defending asset protection trusts.

Alan is a Fellow with The American College of Trust and Estate Counsel (ACTEC) and has received the highest AV Preeminent Rating by Martindale-Hubbell. He has been recognized in Best Lawyers in America since 2016 and received awards for the Lawyer of the Year for Southern Nevada in the area of Trust and Estates (2020) and Trust and Estate Litigation (2017, 2021 and 2023). He has also been recognized as one of the top 100 lawyers in the Mountain States region by Super Lawyers from 2018 to the present. Alan is a member of the State Bar of Nevada and recently completed serving a twelve-year period on the Standing Committee on Ethics and Professional Responsibility, including a two-year term as committee chair. Currently, he serves on the Southern Nevada Disciplinary Board and as a co-chair of the Legislative Committee for the Probate and Trust Section (a position he has held since 2014) for the State Bar of Nevada. Alan also volunteers as a mentor for the State Bar of Nevada's Transitioning into Practice Program (TIP) since 2015, where he has assisted and trained newly licensed lawyers on Nevada-specific rules, procedures, ethics, and best practices.

PRESENTERS

Martin Hall, Partner
Hall & Diana LLC

Martin Hall is a founding partner of Hall & Diana LLC, a boutique trust, and estates law firm in Boston. He is also a Managing Director of Ropes Wealth Advisors, now a division of RWA Wealth Partners. Martin was with Ropes & Gray LLP for 37 years, serving as a partner of the firm from 1994 to 2023 and as the Chair of its Private Client Group from 2006 to 2023. He was instrumental in setting up the firm's registered investment adviser, Ropes Wealth Advisors, in 2014. Martin's legal practice is concentrated in the areas of wealth management, estate planning, trust and estate administration, and charitable giving. He is a member of the American Bar Association (Tax Section) and was Chair of the Tax Section's Estate and Gift Taxes Committee from 2008 until 2010. He is also a fellow of the American College of Trust and Estate Counsel (ACTEC) and was the Chair of ACTEC's Charitable Planning and Exempt Organizations Committee from 2010 until 2013 and the President of the ACTEC Foundation from 2014 until 2017. Martin was the Chair of the New England Estate Planning Conference (organized by Massachusetts Continuing Legal Education) from 2007 through 2012. Martin was a founding member of the Professional Advisors Committee to The Boston Foundation and served as the Committee's initial Chair from 2000-2008. In 2020, The Planned Giving Group of New England awarded Martin the David M. Donaldson Distinguished Service Award for his "outstanding service and leadership in the field of charitable gift planning".

Martin is a co-author of The Harvard Manual on the Tax Aspects of Charitable Giving (9th ed. 2011) and of Practical Guide to Estate Planning (CCH 2023). He is a frequent speaker at national and local charitable giving and estate planning programs and has been quoted on various charitable tax matters in The Wall Street Journal. He holds law degrees from Cambridge University (Trinity Hall) (M.A., First Class Honors, 1981) & Boston University School of Law (J.D., summa cum laude, 1986). He was a visiting fellow and lecturer in law at the University of Chicago Law School in 1982-83.

Todd Hammond, Vice President, National Business Development Officer
Bryn Mawr Trust Company

Todd Hammond is the Vice President and National Business Development Officer for The Bryn Mawr Trust Company of Delaware. In this role, Todd is responsible for the sales of Personal Trust services and marketing of the asset management business. He has over 11 years of experience in Personal Trust, having worked for Wilmington Trust Company/M&T Bank prior to his tenure with the Bryn Mawr Trust Company of Delaware.

Todd received his undergraduate degree from Gettysburg College and a Master's Degree in Business Administration from Wilmington University. He also earned his Certified Trust Fiduciary Advisor designation from the Institute of Certified Bankers in 2015.
He's been a member of STEP since 2016. Areas of Expertise: Trust Administration • Financial Services • Relationship Management • Business Development

David Handler, Partner
Kirkland and Ellis

David A. Handler heads the Trusts and Estates Practice Group of Kirkland & Ellis LLP. David is a fellow of the American College of Trust and Estate Counsel (ACTEC), and a member of the NAEPC Estate Planning Hall of Fame as an Accredited Estate Planner (Distinguished), the Chicago Estate Planning Council, and the professional advisory committees of several non-profit organizations. He is the author of numerous articles in estate planning and taxation journals and writes the monthly "tax update" column for Trusts & Estates Magazine. He is ranked in "Band 1" by Chambers USA in the Wealth Management category, is listed in The Best Lawyers in America©, (Trusts and Estates) and its 2015 and 2019 Trusts and Estates "Chicago Lawyer of the Year". David is a co-author of an e-book on estate planning, The Complete Estate Planning Sourcebook (published by Wolters Kluwer). He is regularly interviewed for trade and news periodicals and is a frequent lecturer at professional education seminars. David is a graduate of Northwestern Pritzker School of Law and received a B.S. Degree in Finance with highest honors from the University of Illinois Gies College of Business.

Louis S. Harrison, Partner, Chair Emeritus
Harrison LLP

Louis S. Harrison has long been recognized as one of the premier estate planning attorneys in the country. A founding partner of Harrison LLP – one of the nation's most elite estate planning firms – Lou's practice encompasses all aspects of trust and estate planning, including estate and business planning for closely held companies. In addition to individuals in need of sophisticated planning, Lou represents numerous family offices, public figures, CEOs of public companies, closely held businesses, as well as other entities and prominent individuals.

During his nearly four-decade career, Lou has developed unique and creative estate planning techniques which are utilized by high-end estate planners across the country. Recognizing his extraordinary talent, attorneys across the nation view Lou's estate planning documents as "best practices" for complex planning. Lou is a frequent keynote speaker, and he has written more than 200 articles on a broad range of estate-planning topics which have been published in legal, accounting, tax and estate planning journals and periodicals. Lou has also co-authored two books, and he joint ventures nationally with other practitioners regarding advanced planning matters and defending plans before the Internal Revenue Service.

In acknowledgment of his exceptional work, Lou has received numerous peer-rated awards. These include being selected as Best Lawyers in America's "Lawyer of the Year" in trusts and estates, on multiple occasions as well as many other prestigious honors. Lou is a member of the American College of Trusts and Estate Counsel, and he is its current Illinois state chair. Lou has also been an adjunct professor at Northwestern University School of Law, DePaul University College of Law, and Chicago-Kent College of Law. He received his B.A. in math from Colgate University, magna cum laude; his J.D. from Duke University with high honors; and his M.B.A. in finance, with honors, from the University of Chicago. In addition to swimming in Lake Michigan long after the summer's end, Lou's hobbies include football, hockey, hiking, reading, behavioral finance, and bad puns (are there any other kind).

Enrique Hernandez, Partner
Procopio Law Firm

Enrique provides international tax planning and related international matters, particularly Mexican and U.S.-Mexican legal matters. Enrique represents clients in the development of business transactions, worldwide investment and financing structures, planning for worldwide income and estate and inheritance taxes. He serves on Procopio's Management Committee, leads its Latin America-U.S. Cross-Border practice, and co-leads its Beer, Wine, and Spirits practice.

Enrique worked for ten years in the Mexican government in the areas of tax, finance, and administration, acting as Subprocurador Fiscal de la Federación (Under Fiscal Federal General Attorney) in charge of consultation and legislative issues, Director General Jurídico (Legal General Director) of IPAB (Mexico's Bank Deposit Insurance Federal Authority) and Director Jurídico (General Counsel) of FIDELIQ. Before his public career, Enrique was an associate attorney for the law firm of Bryan, González Vargas y González Baz in Mexico City. Before relocating to San Diego, he was on the faculty at ITAM (Instituto Tecnológico Autónomo de México) in Mexico City teaching advanced courses in tax law in its School of Law. Enrique is a past chair of the International Law Section and of the International Tax Committee of the Tax Section of the California State Bar and of the International Law Section of the San Diego Bar Association. He is a member of the Practice Council for NYU's School of Law's LLM in International Tax and of the Council for the Center for U.S.-Mexican Studies of the University of California, San Diego. Enrique has published articles on tax law and policy and has directed several tax related professional thesis. He is a frequent speaker at international tax events through Latin America, Mexico and the U.S. He is a prolific writer of articles and essays on international tax topics and has been the subject of various media interviews in Mexico and the U.S.

Neil T. Kawashima, Partner
McDermott Will & Emery

Neil T. Kawashima is the head of the Firm's Private Client Practice Group and has a diverse practice, representing wealthy individuals and families in matters related to philanthropy and assisting clients with estate and wealth transfer planning, business succession and governance, and estate and trust administration. Neil's clients include philanthropists, owners of privately held businesses, beneficiaries of long-term trusts, fiduciaries, and entrepreneurs. A significant portion of Neil's practice is focused on philanthropic matters. He counsels individuals and families on charitable giving strategies, helping them to create tax-exempt entities, including private foundations, operating foundations, public charities, supporting organizations and social welfare organizations. Neil also has significant experience counseling his clients on the design and implementation of charitable gift and pledge agreements, split-interest charitable trusts and other charitable giving strategies. He advises clients on issues concerning donative intent, "mission drift," long-term governance of philanthropic vehicles and charitable components of family offices and family investment structure. On behalf of his clients, Neil has negotiated major gifts with charitable organizations and has helped his clients identify, formulate and enforce their charitable goals. Neil has significant experience advising clients on state and federal audits related to charitable organizations and charitable giving. Neil frequently speaks and writes on matters involving philanthropy. Education Cornell Law School, JD, 1996 University of Chicago, AB, 1993 | Admissions Illinois | Courts/Agencies US District Court for the Northern District of Illinois.

Richard Kinyon, Partner
Shartsis Friese LLP

Richard Kinyon is a partner in the Family Wealth Planning practice group. He specializes in the design and implementation of complex domestic and international estate plans for high-net-worth U.S. resident and non- resident individuals, including the establishment of various sophisticated irrevocable trusts and family investment companies and how to pass interests in their family business and investment companies to younger-generation family members and others in a tax-advantaged and creditor-protected manner, minimizing inter-family conflict.

He also advises fiduciaries and beneficiaries regarding the administration of estates and trusts, including fiduciary litigation matters. Kinyon was certified as a Specialist in Taxation Law by the California Board of Specialization from 1973 through 2023, and he also is certified as a mediator by the Bar Association of San Francisco, specializing in mediating disputes among litigants and other parties involving their interests in trusts and estates or other jointly owned property.

Francine Lee, Managing Director/Business Leader
Ernst & Young LLC

Francine Lee is a Managing Director and the Business Leader for the EY Fiduciary/Trust & Estate Accounting Services (FTEAS) team. FTEAS is a national practice with a team of over 30 professionals focused exclusively on the preparation of fiduciary/court accountings for banks, trust companies, law firms, family offices, and professional and individual fiduciaries across the country.

Francine brings over 25 years of experience creating income tax and estate planning approaches for high-net-worth clients and building platforms and products at industry-leading organizations.

Francine began her career as a tax attorney in private practice focusing on income and estate tax planning.

Francine is a frequent speaker at industry conferences and a published author on topics impacting fiduciaries, including fiduciary leading practices, fiduciary accountings and calculation of fiduciary accounting income. Francine holds a Master of Laws in Taxation from New York University School of Law and a Juris Doctor from Western New England School of Law.

She is admitted to the New York State Bar and is on the Executive Committee for the New York Bar Association Trust & Estate Section.

PRESENTERS

Paul Lee, Chief Tax Strategist, Executive Vice President
The Northern Trust Corporation

Paul S. Lee is the Chief Tax Strategist of The Northern Trust Company, within the Global Family & Private Investment Offices Group and Wealth Management division of Northern Trust. He is an Executive Vice President and Managing Director of the company. Prior to joining Northern Trust, he was at Bernstein Global Wealth Management as National Managing Director, and a partner in the Atlanta-based law firm of Smith, Gambrell & Russell, LLP. Paul is a Fellow of the American College of Trusts and Estate Counsel and an Academician of the International Academy of Estate and Trust Lawyers. He has been inducted into the NAEPC Estate Planning Hall of Fame® and designated an Accredited Estate Planner® (Distinguished). He was the American Bar Association Advisor to the Uniform Law Commission Uniform Fiduciary Income and Principal Act.

Paul is a member of the American Bar Association, Florida Bar, and State Bar of Georgia. Paul received a B.A., cum laude, in English and a B.A. in chemistry from Cornell University, and a J.D., with honors, from Emory University School of Law, where he was notes and comments editor of the Emory Law Journal; he also received an LL.M. in taxation from Emory University. Paul was the recipient of the Georgia Federal Tax Conference Award for Outstanding Tax Student and the Ernst & Young Award for Tax and Accounting. A frequent lecturer and panelist on investment planning, tax and estate planning. Paul has spoken at the Heckerling Institute on Estate Planning, ACTEC National Meeting, Southern Federal Tax Institute, USC Institute on Federal Taxation, Southern California Tax & Estate Planning Forum, Notre Dame Tax and Estate Planning Institute, AICPA National Tax Conference, and the AICPA Advanced Estate Planning Conference.

Elise McGee, Partner
McDermott Will & Emery

Elise J. McGee advises high-net-worth individuals and business owners on all aspects of wealth-transfer planning, including estate & trust administration, leveraged wealth-transfer techniques, tax matters, cryptocurrency & QSBS planning, real estate transactions and closely held business matters. Elise has extensive experience working with owners of closely held businesses to develop governance and succession plans, and on corporate, tax and compliance matters relating to those businesses. Elise is an American College of Trust and Estate Counsel (ACTEC) Fellow and has been (Continues)

Elise McGee, Partner
McDermott Will & Emery

(Continued) recognized in Chambers High Net Worth 2022, Illinois: Private Wealth, Up and Coming. She is currently a member of the Executive Committee of the Trust Law Committee of the Chicago Bar Association, where she acts as legislative liaison.

Elise has worked with state regulators to develop customized private trust company structures for clients, including for international families. Most recently, she co-drafted Wyoming's 2019 trust company legislation, including 2021 legislative updates. Elise has analyzed SEC and regulatory compliance issues facing private trust companies and has helped clients develop policies and procedures for their private trust companies. She also advises clients on the litigation and regulatory risks facing private trust companies and their decision makers. Elise works with clients, including registered investment advisers and multi-family offices, to establish and transition trusteeship to retail trust companies. She also advises retail trust companies on cryptocurrency custody matters. She helps clients structure the multi-jurisdictional relationships between trust companies, family offices and closely held businesses.

Justin Miller, Partner, National Director of Wealth Planning
Evercore Wealth Management

Justin Miller is a Partner and the National Director of Wealth Planning at Evercore Wealth Management, counseling advisors and clients on complex taxation, trusts and estates, charitable planning, and family governance issues. He additionally serves as a Senior Wealth and Fiduciary Advisor at the San Francisco office of Evercore Wealth Management and Evercore Trust Company. Prior to joining Evercore in 2021, Justin was a national wealth strategist for 10 years at BNY Mellon. He previously was a managing director at Wells Fargo and began his career as a tax attorney at Sidley Austin.

Justin is an adjunct professor at Golden Gate University School of Law, a Fellow of the American Bar Foundation, and a Fellow of the American College of Trust and Estate Counsel. He has served in leadership positions with the American Bar Association, California Bar Foundation, San Francisco Estate Planning Council, and State Bar of California, and is a former editor-in-chief of the California Tax Lawyer. Additionally, he is a past recipient of the Outstanding Conference Speaker Award from the California Society of CPAs and the V. Judson Klein Award from the California Tax Bar. Justin received a B.A., with honors, from the University of California, Berkeley, and a J.D. and LL.M. in Taxation from New York University School of Law. He also holds the Accredited Estate Planner® designation and a CERTIFIED FINANCIAL PLANNER™ certification and is a member of the State Bar of California.

PRESENTERS

Michaelle Rafferty, Esquire
Maupin Cox & LeGoy Law Firm

Michaelle DiGrazia Rafferty ("Michaelle") is a shareholder attorney in the law firm of Maupin, Cox & LeGoy, primarily practicing in the areas of estate planning, taxation, administration of trusts and estates, and family trust company planning and operations. Michaelle also practices in trust and estate related litigation, fiduciary litigation, and tax and audit related actions. Michaelle has been admitted as a Fellow of the American College of Trust & Estate Counsel (ACTEC) where she serves as the Nevada State Chair and is a member of the Practice and Fiduciary Litigation Committees. Michaelle recently completed her position as Chair of the Nevada State Bar - Probate & Trust Section where she served as an executive officer. She continues to be an active member of the Section's Legislative and Amicus committees for Nevada, including drafting & testifying on pending legislation before the Nevada legislature, and appearing before the Nevada Supreme Court on matters of trust and estate litigation, including actions related to Nevada asset protection trusts. She serves as the Court-appointed member of the Nevada Supreme Court's Bench-Bar Committee representing interest of trust and estate counsel. Michaelle is a founding and current Executive Officer for the Probate Bar Association of Washoe County and has previously served as Executive Officer of the Washoe County Bar Association. She is also a long-standing member of the Northern Nevada Estate Planning Council and is a frequent speaker and presenter for both national and state continuing education courses related to her areas of practice. Michaelle represents diverse clientele including individuals, families, entities, private and commercial trust companies, university foundations, financial institutions, private and public foundations, family offices and private family trust companies.

Timothy Riley, Partner
Aguirre Riley

With deep experience representing clients before the Internal Revenue Service, Tim brings unique skills to bear on his clients' estate and family business planning issues. His intimate knowledge of tax code allows him to help his clients structure their wealth so that it grows while maintaining compliance with tax law. Recognition Mountain States Super Lawyers® Rising Stars, Estate & Probate (2013-2016) Nevada Business Magazine, Nevada Legal Elite (2012-2014) Professional & Civic Affiliations Member of the Estate Planning Council of Northern Nevada Board Member and Membership Co-Chair of the Planned Giving Roundtable of Northern Nevada Member of the University of Nevada Reno Planned Giving Advisory Council Former member of Supervisory Committee for Great Basin Federal Credit Union Member, Nevada State Bar Member, Washoe County Bar Association Member, Colorado Bar Association Member, American Bar Association.
Tim focuses mainly on estate and family business planning, tax-exempt entities and probate, as well as the areas of trust administration, and corporate law.

PRESENTERS

Jay Schulman, Principal, National Leader of Blockchain and Digital Access
RSM – US LLP

Jay Schulman, a principal with RSM US LLP, is also the national leader of the blockchain and digital assets practice. Bringing together all RSM services—audit, tax, and consulting. Jay leads the firm's capability in addressing enterprise blockchain technology and the adoption of digital assets such as bitcoin. With 20 years of experience in information security and technology innovation, Jay helps clients think through how to adopt blockchain and digital assets, build within the confines of the U.S. regulatory environment, and mitigate risks through operational security and proper implementation of technology. Jay's experience includes assessing the implementation of a new cryptocurrency at one of the world's largest futures and options exchanges, including evaluating the people, processes, code, security and organizational risk. He has also assisted a number of financial institutions in meeting Bank Secrecy Act and anti-money laundering requirements when accepting or transmitting cryptocurrencies.

Jay has helped companies bring nonfungible tokens to market in a compliant manner. Jay sits on the auditing and accounting subgroups of the Digital Assets Working Group of the American Institute of Certified Public Accountants and chairs the Proof of Reserves Working Group. Professional affiliations and designations: AICPA Digital Assets Working Group, auditing and accounting subgroups; AICPA Proof of Reserves Working Group chair; Accounting Blockchain Coalition, board member. Education: Bachelor of Science, University of Illinois Urbana-Champaign.

Elizabeth Sevilla, CLU, ChFC, Tax Partner
Seiler LLP

Elizabeth has over 25 years of experience. She has spent the vast majority of her career with individual taxation and is a leader in the firm's Trust & Estate Practice. Elizabeth works closely with high-net-worth individuals, owners of closely held real estate and technology companies, and corporate executives and partners of investment banking and venture capital firms.

She holds expertise in several disciplines, including individual and fiduciary income tax compliance and planning, both domestic and international; estate, trust, gift, and charitable planning; estate tax return preparation and post-mortem funding; business succession; executive benefit planning; and life insurance due diligence.

Elizabeth joined Seiler in 2009. Prior to that, she served as a Senior Tax Director for BDO, a Senior Tax Manager for Deloitte, and a Senior Tax Manager for KPMG. She is a certified Enrolled Agent (EA) with the Internal Revenue Service (IRS), and a Chartered Life Underwriter (CLU) and Charter Financial Consultant (ChFC) through Bryn Mawr American College. Elizabeth earned a Bachelor's degree in Economics and Psychology, University of the Philippines.

Sean J. Tevel, Partner
Holland & Knight

Sean Tevel is a private wealth services and international tax attorney in Holland & Knight's Miami office. Mr. Tevel advises foreign and domestic clients on U.S. federal income, gift and estate tax matters associated with their cross-border investments and businesses.

Mr. Tevel has significant experience with respect to the structuring of U.S. real estate investments, including the application of the Foreign Investment in Real Property Tax Act of 1980 (FIRPTA). He often represents domestic and foreign funds on fund formation and associated structuring considerations for non-U.S. investors. He also regularly advises on joint venture transactions both in a domestic and cross-border context.

Mr. Tevel's international tax practice involves providing advice with respect to multinational trust and business structures, including the application of the controlled foreign corporation rules, the Passive Foreign Investment Company (PFIC) rules and international tax treaties.

Mr. Tevel has assisted many clients in the establishment of Qualified Opportunity Funds (QOFs) and the maximization of tax benefits associated with investments in Opportunity Zones (OZs).

Prior to joining Holland & Knight, Mr. Tevel was a tax attorney in the Miami office of an international law firm. Honors & Awards: The Best Lawyers in America guide, Miami Tax Law Ones to Watch, 2021-2024; Chambers USA – America's Leading Business Lawyers guide, Tax (Up & Coming), 2022, 2023; Rising Star, Florida Super Lawyers magazine, 2020. Education: University of Miami School of Law, LL.M., Taxation; University of Miami School of Law, J.D., cum laude; McGill University, B.A.,; Economics and Political Science; Bar Admissions/Licenses: Florida; Spoken Languages: French

Kristen Simmons, Partner Founder
Simmons Freeman LLC

Kristen is a founding partner of Simmons Freeman/NV Trust Lawyers. For more than 19 years, she has been counseling clients in the areas of estate planning and asset protection planning.

Kristen is well respected in the estate planning community and has been named as 2023's "Lawyer of the Year" in Trusts and Estate by The Best Lawyers in America®, and previously as 2021's "Lawyer of the Year" in Tax Law by The Best Lawyers in America®.

While she enjoys designing an estate plan to meet a client's tax and asset protection objectives, her favorite part of her practice is being a trusted advisor to multiple generations of families.

Karen Sugihara, Regional Fiduciary Manger – Senior Vice President
BNY Mellon Wealth Management

Karen Sugihara is the Regional Fiduciary Wealth Manager leading BNY Mellon Wealth Management's fiduciary team in the Western Region. Karen is responsible for the management and administration of client trust relationships and collaborates with local and regional wealth management teams on existing and prospective investment management and fiduciary client relationships. Karen is also responsible for implementing strategic national fiduciary priorities in coordination with regional fiduciary needs.

Karen joined BNY Mellon Wealth Management in September of 2021. Prior to joining the firm, Karen was the Senior Regional Fiduciary Manager for Wells Fargo Private Bank, managing the San Francisco, North Bay, East Bay and South Bay regions for over three years. She was also a Senior Wealth Planning Strategist with Wells Fargo Private Bank in Southern California for over five years. Before entering the wealth management industry, Karen practiced law for over 20 years, and has attained an AV-Preeminent Martindale Hubbell® Peer Review Rating™.

Karen frequently presents to bar associations and estate planning councils on topics related to fiduciary, estate planning and estate administration issues. Karen has presented to the California Lawyers Association, Hawaii Tax Institute, Kasner Symposium, San Francisco Bar Association, Beverly Hills Estate Planning Council, and the Seattle Estate Planning Council.

On a personal note, Karen is the proud mother of a son, Jonathan, who is a teacher in Los Angeles; and a daughter, Amanda, who is a recent graduate of U.C. Berkeley and beginning medical school in 2023. Karen is a former professional show dog handler of champion German Shepherd Dogs.

Education: J. D., Pepperdine University School of Law ; B.S., University of California, Riverside
Community: Legacy Support Council, Cancer Support Community San Francisco Bay Area
Memberships: State Bar of California; National Asian Pacific American Bar Association: Asian American Bar Association; Estate Planning Council of Diablo Valley: East Bay Trusts and Estates Lawyers.

Raymond L. Thornson, Managing Director
Andersen

Ray Thornson has over 25 years of experience in tax practice. Ray works primarily with high-net-worth individuals and closely held businesses and advises on matters related to income tax planning and compliance, estate planning and charitable giving.

Ray serves a variety of clients ranging from large family groups with family offices to entrepreneurs building their wealth. Ray also collaborates closely with clients' attorneys and investment advisers to help clients optimize their financial and tax planning results.

Before joining Andersen, Ray was with Arthur Andersen and KPMG in San Francisco and Seattle. Ray has lectured on income and estate tax matters for the California CPA Education Foundation, USC Tax Institute, Golden Gate University, and a variety of other professional venues. He also is a contributor to the tax treatise Tax Economics of Charitable Giving.

Joe P. Toce, Jr., Managing Director
Andersen

Joe Toce is a Managing Director in the Private Client Services practice at Andersen. He has over 36 years of experience in advising private clients on a broad range of tax, financial and business matters. He has represented several of the largest family companies in the United States on tax and estate planning matters. He also has substantial experience with charitable giving.

Joe specializes in integrated tax planning for high-net-worth individuals and families. His extensive experience enables him to anticipate and plan for minimizing income, estate and gift taxes for his clients. His client base includes several of the largest S corporations in the country, numerous multinational families, and many large charitable foundations.Before joining Andersen, Joe was a Tax Partner at Arthur Andersen where he headed the Private Client Services Practice in New York. Joe is a co-author of the treatise Tax Economics of Charitable Giving and is a frequent speaker on individual tax matters.

Raul Villarreal Garza, Partner
Procopio Law Firm

Raúl advises clients on a variety of matters related to international tax law. He participates as an international-tax advisor to business leaders expanding their foreign operations into the United States. Raúl has extensive experience counseling families with multiple nationalities on their international estate planning needs and is a trusted advisor to family offices in a wide range of tax and legal issues.

Recognitions: Best Lawyers® Ones To Watch, Tax Law, and Trusts and Estates Law, 2021-2024
Education: LLM (International Taxation), New York University School of Law, 2010 LLB, Instituto Tecnológico y de Estudios Superiores de Monterrey, México, 2006 Masters (Taxation), Universidad Autónoma de Nuevo León, 2009.
Thought Leadership: Panelist. "U.S. Investment Structures for High Net-Worth Individuals," Procopio International Tax Institute, San Diego, CA, May 26, 2023. Panelist. "Nearshoring: Legal and Tax Considerations for Relocating to Mexico," Procopio International Tax Institute, San Diego, CA, May 25, 2023. Speaker. 2nd Annual International Tax Conference, Freeman Law, Oct. 21-22, 2022. Author. "The Grounded International Lawyer," San Diego Lawyer magazine, July/August 2020 Issue. Moderator. "From NAFTA to USMCA," USD Procopio International Tax Institute, November 1, 2018. Moderator. "Challenges of the Mexican and US Tax Systems with Regard to the Cross-Border Digital Economy," USD Procopio International Tax Institute, November 1, 2018. Speaker. "A Dive into What Do Planners Need to Know When Dealing With our Foreign Neighbors," California Lawyers Association, The 26th Annual Estate and Gift Tax Conference, San Francisco, March 16, 2018.

Joseph J. Viviano, Partner
McDermott Will Emery, LLP

Joseph advises clients on all matters pertaining to the intergenerational transfer of wealth, including estate planning, succession planning, tax planning, trust and estate administration, audits, examinations, controversy avoidance and litigation. He also guides clients on the formation, governance and operation of private trust companies and family offices. His clients are located throughout the United States and include high-net-worth individuals and families, private trust companies, family offices, family office executives and large banks. Joseph has successfully argued before trial and appellate courts in multiple jurisdictions. Due to his unique background in tax, planning and litigation, clients turn to Joseph to advise them in complex disputes involving family members, spouses, employees, and business partners. A significant part of his practice involves counseling family offices and private trust company executives on strategies and best practices for avoiding personal liability. Joseph is frequently able to favorably resolve disputes without litigation. If necessary, however, he vigorously defends his clients' interests in the courtroom.

Joseph is a frequent contributor to the bar. In addition to publishing numerous articles and book chapters, he is principal draftsman of the forthcoming Michigan Trust Company Act. He assisted drafting the Michigan Uniform Fiduciary Income & Principal Act and the Model Civil Jury Instructions Regarding Undue Influence, among other legislative matters.

Ryan J. Works, Partner
McDonald Carano Law Firm

Ryan Works is Chair of the Bankruptcy, Insolvency & Financial Restructuring Practice at McDonald Carano. Mr. Works represents creditors and debtors both in and out of bankruptcy, under Chapter 11 and 7 of the Bankruptcy Code. He has represented the debtor in possession and successfully restructured several businesses. He has represented secured lenders, landlords, tenants, health care ombudsman, buyers, sellers, and other parties in interest. Mr. Works has significant experience prosecuting and defending avoidance actions, adversary cases, and related litigation and has handled fraud cases and non-discharge matters. He received *Martindale-Hubbell's* AV Preeminent Peer Review Rating (since 2012) and is recognized in *The Best Lawyers in America* in Bankruptcy Litigation and Bankruptcy & Creditor Debtor Rights/Insolvency and Reorganization Law.

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Matthew Wolf, Director, Blockchain & Digital Assets, RSM – US LLP

Matt is a director for RSM's blockchain and digital asset practice focusing on strategy, risk and compliance. Additionally, he leads RSM's efforts in advising US regulated financial institutions engaging in novel activities. Matt has over 15 years of experience working with emerging business models and strategic implementations at the highest level of both the public and private sectors, internationally and domestic. Matt's also serves technology companies entering the regulated space as chartered financial institutions or money transmitters engaging in digital asset activities. Matt's representative experience includes: Advising many of the first federal and state bank charter applicants with concentrated activities in digital assets and other novel activities; Advising on the development of strategic, operational, and compliance strategies for domestic and international digital asset custodians, payments firms and lenders; Advising leading financial institutions, financial services companies and fintech companies on digital asset strategy, regulatory, risk and implementation matters; Advising leading fintech companies on strategies for bringing both institutional and retail digital asset products to market; Advising leading digital asset creators, digital asset exchanges, NFT platforms/markets, software companies and developers on operational, compliance, and financial matters; Advising private organizations on available bank and trust charter types and pathways Education: Bachelor of Arts, Indiana University, Bloomington MIT Sloan School of Management Master of Business Administration, University of Minnesota's Carlson School of Management Bachelor of Science, finance and operations management, University of Minnesota's Carlson School of Management.

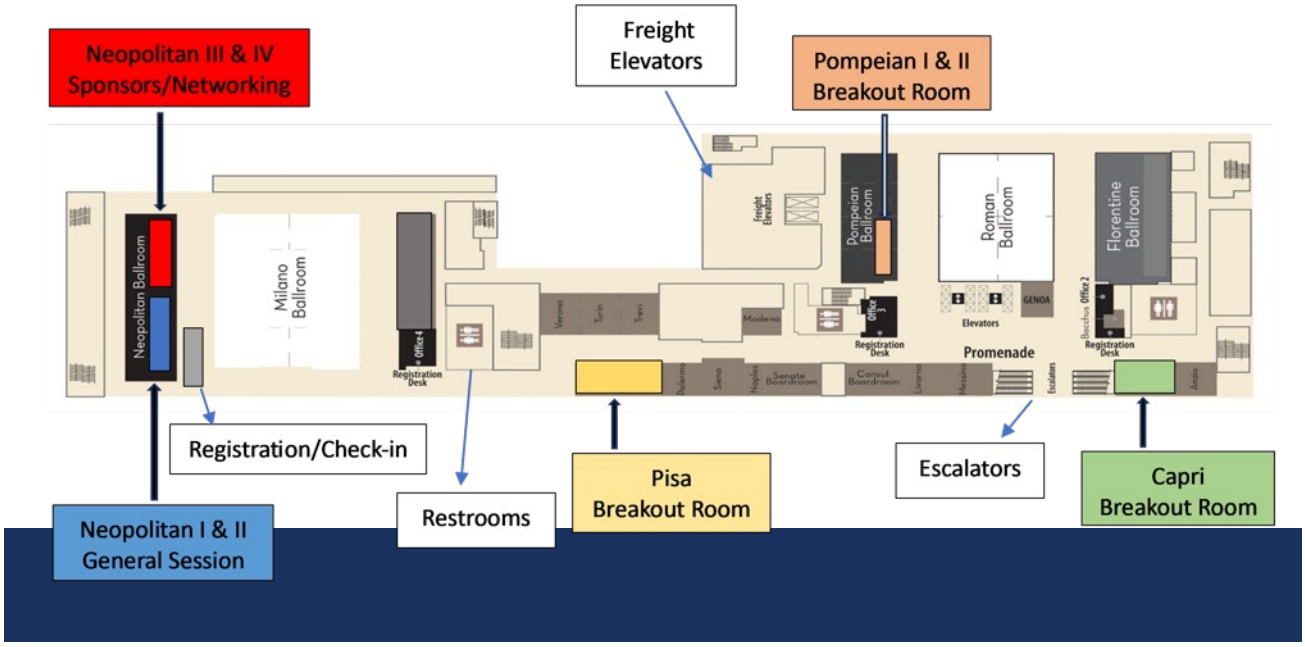
Naomita Yadav, Partner
Withers Bergman LLP

Naomita has a diverse and well-rounded tax background, including experience in both income tax and estate and gift tax matters, which makes her particularly suited for families with existing complex trust structures. She also has experience with cross-border families as well as nuances of visa designations and the interplay with tax laws. Interestingly, her own family is situated in three continents. Naomita advises families with generational wealth in the context of changing circumstances and passage of time such as multi-generation wealth planning for family members who are beneficiaries of trusts settled by prior generations. This particular mix of experiences and knowledge enables Naomita to act as a proficient adviser for the globally mobile high net worth family. She also advises clients on tax, estate and succession planning related to cryptocurrencies and digital assets.

CONFERENCE MAPS

Promenade Level:

- Neopolitan I & II – General Session
- Neopolitan III & IV – Sponsors/Networking (Meals and Reception)
- Pompeian I & II – Breakout Room
- Pisa – Breakout – Breakout Room
- Capri – Breakout – Breakout Room
- Registration/Check-in



2024 Nevada Trust Conference