

Publications/Speeches

Co-author: United States chapter, “Getting the Deal Through: Private Client 2017”, by Anthony Thompson and Nicole Aubin-Parvu (contributing editors) of Gowling WLG (UK) LLP, December 2016

Co-author: United States chapter, “Getting the Deal Through: Private Client 2016”, by Anthony Thompson and Nicole Aubin-Parvu (contributing editors) of Wragge Lawrence Graham & Co LLP, December 2015

Co-author: United States chapter, “Private Client Tax: Jurisdictional Comparisons”, 3rd Edition, by John Rhodes (Editor), April 2015

Co-author: “United States”, *The International Guide to the Taxation of Trusts*, Dr. Timothy J. Lyons Q.C. and Joanna Wheeler, editors, International Bureau of Fiscal Documentation (2014)

Speaker: “Is the World Really Flat for U.S. Families Investing Abroad?”, *Sustainable Family Office Operations and Management*, New York, NY, June 2014

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Speaker: “We’ve Got Good News and Bad: You’re the Beneficiary of a Foreign Trust”, *AICPA National Tax Conference*, Washington, DC, November 2012

Speaker: “Proposals to Integrate Subchapter J with the CFC and PFIC Regimes for Foreign Trusts”, *STEP Mid-Atlantic*, Washington, DC, January 2011

Author: “ACTEC Proposals Integrate Subch. J, PFIC Regime for Foreign Trusts”, *Tax Notes*, October 11, 2010

Author: “Gauging and reducing risks to the family business”, *Family Business*, Spring 2008

Author: “Reverse *Focardi*”, *Trusts & Estates*, July 2006

Speaker: “Wealth Transfer and Charitable Planning with Financial Derivatives”, *Family Office Symposium*, Aventura, Florida, April 2006

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Contributor: International Law Office, *Offshore Services Newsletter – U.S.A.*, (www.internationallawoffice.com), 2005

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Co-author: “Pre-Residency Planning”, *A Guide to International Estate Planning*, 2d ed., Jeffrey A. Schoenblum, editor, American Bar Association (2000)

Co-author: “Respect for “Form” as “Substance” in the U.S. Taxation of International Trusts”, 32 *Vanderbilt Journal of Transnational Law* 675, May 1999