

## Use of Trusts in Pre-IPO Planning

13 February 2012 (Monday) • 12.00-2.00pm • Oasis Theatre, 13th Floor, Park Mall, 9 Penang Road  
\*\*Please note change of venue

### About this Seminar

Significant wealth is being generated throughout Asia through local and US IPOs.

This presentation will address the use of trusts and structured transactions to achieve optimal tax benefits for the owners of companies that may go IPO in the future. Tax issues for the settlers and beneficiaries will be addressed with a focus on Singapore, Hong Kong, China and US tax issues.

Examples will illustrate the benefits of the planning.

### Seminar Programme

12.00 -12.30pm	Registrations & Standing Buffet Lunch
12.30 - 12.35pm	Opening Remarks & Overview by Chairperson <i>Ms Seema Bhayat, SG Trust (Asia) Ltd</i>
12.35 - 1.45pm	Use of Trusts in Pre-IPO Planning <i>Mr. Todd M. Beutler</i>
1.45 - 2.00pm	Q&A Session & Closing Remarks

### About the Speaker

**Mr. Todd M. Beutler**

With over 15 years of tax and trust experience, Todd's practice is focused on advising high-net worth individuals and families, their business entities, trusts and family offices, and related charitable foundations and organizations on a wide range of international tax and estate planning matters. Todd also represents clients in tax controversy matters and in litigation of disputes involving trusts, estates, conservatorships and guardianships.

### About the Chairperson

**Ms Seema Bhayat, SG Trust (Asia) Ltd**

Seema Bhayat, TEP, is a senior wealth planner and head of the corporate trust administration team with SG Trust (Asia) Limited. Seema has been working with high net worth families and their advisors to provide wealth management solutions for more than 10 years. She started her career in Paris with Societe Generale Private Banking wealth planning team dedicated to entrepreneurs. In 2001, she moved to Luxembourg to join the Societe Generale Private Banking International wealth planning team. She then relocated to London with SG Hambros Bank advising on trusts and other wealth management solutions. In 2009, she joined SG Trust (Asia) Ltd as a senior wealth planner focusing on ultra net worth families.

### REGISTRATION FORM

Name (Dr/Mr/Mrs/Miss/Mdm): \_\_\_\_\_

Name and Address of Organisation: \_\_\_\_\_

STEP Membership No: \_\_\_\_\_ Position in Organisation: \_\_\_\_\_

Tel number: \_\_\_\_\_ Fax number: \_\_\_\_\_ Email: \_\_\_\_\_

(A valid email address is required for confirmation of registration.)

MEMBERSHIP (Please circle as appropriate.)	FEES
Members of STEP	<b>S\$60</b>
Chartered Institute for Securities and Investment (CISI) Singapore, CFA Singapore, CPA Australia, CPA Singapore/ICPAS, International Fiscal Association (IFA), Law Society of Singapore, Singapore Corporate Counsel Association (SCCA), Singapore Trustees Association (STA), Singapore Association of the Institute of Chartered Secretaries and Administrators (SAICSA)	<b>S\$80</b>
Others	<b>S\$100</b>

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Account Name: STEP (Singapore Chapter)      Account Number: 048-017070-6      SWIFT code: DBSSGSG  
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 Please email [secretariat@step.org.sg](mailto:secretariat@step.org.sg) after the T/T has been done for our follow-up with the bank. Registration fees must be received net of all bank charges.

#### Cheque Details:

Cheque payments should be made payable to "STEP (SINGAPORE CHAPTER)" & arrive at our office at "c/o INTELLITRAIN PTE LTD, Level 16 Malacca Centre, 20 Malacca Street, S (048979)" with the completed registration form on or before the closing date, **Monday, 6 February 2012.**

For further enquiries, please contact: STEP (Singapore) Secretariat  
**Tel & Fax: (65) 31287781 (no 6 prefix)**      **E-mail: [secretariat@step.org.sg](mailto:secretariat@step.org.sg)**      **Website: [www.step.org.sg](http://www.step.org.sg)**

#### REGISTRATION, REFUND & CANCELLATION POLICY

- Registrations will be confirmed upon receipt of full payment accompanied by a duly completed registration form.
- The Organisers reserve the right to refuse to register or admit any participant, and to cancel or postpone the course.
- Equivalent substitute delegates are welcomed, subject to the Organisers being notified at least 2 working days before the course of the substitute delegate.
- The Organisers will not entertain any request for a refund of fees. However a confirmed registrant who has paid in full the course fees but does not turn up for the course will be entitled to collect a set of the materials provided.