

# ESTATE PLANNING

May 25, 2007 - Carlton Hotel  
9am to 5pm

## Background

Estate planning allows people to provide direction about the disposition of their assets after their death. Estate planning can include wills and trusts, as well as powers of attorney and health care directives. Both estate duty and stamp duty (CGT) impact estate planning, and some may find that more elaborate or creative legal means are necessary for their situation. Some of these more complex techniques include trusts, family limited partnerships (FLPs) and limited liability companies (LLCs). Estate tax and other estate-related issues are hot legislative items, with new laws being passed on a regular basis. That's why a competent and experienced estate planning lawyer or a financial adviser with estate planning experience is an essential ally in assuring that your unique estate planning goals are understood and carried out.

Estate and asset protection planning are designed to help people preserve their assets for future needs and goals by making them unavailable to creditors. While many people think asset protection involves shady or dishonest techniques, there are many perfectly legal and ethical means to protect financial reserves and property for retirement or for future generations. These techniques may include tax reduction strategies, financial gifts, business formation, or certain types of wills and trusts. Asset protection is a complex area of estate planning, and requires specific knowledge and experience in a range of laws. If you are interested in asset protection, you should seek out a competent and experienced estate planning lawyer to help you achieve your goals.

Estate planning is important for everyone, even if the estate is likely to be small. It allows a person to ensure that their property will go to the people they want, in the way they want, and when they want. It permits them to save as much as possible on taxes, court costs, and attorneys' fees - plus, it means that their families will have an easier time coping with the administrative and financial aspects of the loss.

This full day interactive workshop on **Estate Planning**. The program will be presented in module format for ease of presentation and understanding with Case studies where ever needed.

The workshop will be conducted by Adjunct Professor Mark Lea, who teaches Trusts Law at the **National University of Singapore** and is the Partner at **Lea & White International Lawyers**, with offices in **Hong Kong** and **Singapore**. Mark has over 35 years of experience in Tax, Trusts & Estate Planning.

## The Purpose of this modular Program is to help YOU achieve:

- in understanding of the principles involved; the details are much less important;
- the ability to identify opportunities for estate planning and for the creation of Trusts;
- the knowledge in general of what to ask clients and why.
- the ability to answer clients' questions in general terms and to know when to refer the questions to a specialist;
- the realization that certain things must and must not be done and why; and
- the understanding of the Trust services which Trust Companies provide and how these can be used for the benefit of clients.
- Some of the common questions that are asked by clients and how to hear them out and understand their needs and reply, they are listed below in "What you will gain"

## What you will gain:

- *Why do Estate Planning?*
- *Who needs Estate Planning?*
- *When should you plan?*
- *Some common Estate plans – Examples*
- *Wills & Capacity*
- *What is Probate?*
- *Probate process and time in Asia*
- *Why bother? Do nothing, live your life!*
- *Joint Ownership – My partner will take care.*
- *Giving away to charity or kids/ grandkids:*
- *What is a Trust? How can it help?*
- *Trusts Vs Will*
- *What is involved in Living Trusts?*

## Who should attend?

- *Trust Advisors*
- *Lawyers*
- *Professional Trustees*
- *Trust Managers*
- *Private Bankers*
- *Financial Advisors*
- *Insurance Advisors*
- *Financial Practitioners*
- *In-House Counsels*
- *CPAs & Accountants*

## Trainer:



**Mark Lea**  
Solicitor  
Lea & White International Lawyers  
Registered Foreign Lawyer in  
Hong Kong & Singapore

## Program Modules:

1. *Estate Planning Overview*
2. *Estate Planning Tools*
  - a. *Gifts*
  - b. *Trusts*
  - c. *Succession*
  - d. *Control*
  - e. *others*
3. *Estate Planning Documentation*
4. *Wills & Capacity*
5. *Probate*
6. *Liquidity Planning*
7. *Taxation*
  - a. *Stamp Duty*
  - b. *Estate Duty*
  - c. *Others*
8. *Insurance Arrangements*
9. *Wills – benefits & weaknesses*
10. *Question & Answer Session.*



For Singapore based company:

Participants may be eligible for Financial Sector Development Fund (FSDF) support on a case by case basis.

Interested applicants should submit their application to the FSDF Secretariat directly. More details on the FSDF can be found at [www.mas.gov.sg](http://www.mas.gov.sg)

## Upcoming Programs:

1. **Business Succession & Trust Planning**
2. **Trust Training Program**
3. **Advanced Trust Training: Trust Structures**
4. **Family Office Management.**

Organised by:



**EG Communications Pte Ltd**  
Singapore



**Mark Lea**  
Solicitor  
Lea & White International Lawyers  
Registered Foreign Lawyer in  
Hong Kong & Singapore

He was admitted as a Solicitor of the Supreme Court of Hong Kong in September 1995. In October 1998 the firm of Lea & White commenced. The partners of the firm and the Consultant to it, have all been admitted as lawyers in both the UK and Hong Kong and been directors of Merchant Banks. It was felt that there was a need for a firm which could be the legal interface with private banks and which specialises in private client work.

Lea & White is small and focused. It specialises in international and comparative taxation for the individual and for his companies and businesses, which is what Mark specialises in. It also specialises in banking and commercial law. The work is particularly concerned with Asia but those concerned are qualified in Hong Kong and the UK and the clients' interests are global.

Mark is a Member of the Hong Kong Inland Revenue Board of Review. He is a member of the Hong Kong Trustees Association and the Society of Trusts and Estate Practitioners (Hong Kong Branch). He lectures frequently on taxation and trusts and allied estate planning matters both in Hong Kong and elsewhere (about once a month).

The firm has been nominated at the Asia Law Awards for the years 1999 and 2000 for the Best Tax & Trusts Practice. The firm has won this award for the year 2001.

During 2002 Mark has been involved on behalf of the firm in advising the Government of Singapore concerning the Trustees Act of Singapore. Currently, he is the Adjunct Professor, at the National University of Singapore, Faculty of Law.

**T. Mark Lea** was born in 1944. He was educated in England at Eton College, where he was President of the Eton Society. He was trained as a lawyer in a well known firm of Solicitors in the City of London. He qualified as a Solicitor of the Supreme Court of England and Wales in 1970.

Subsequently he worked for the Merchant Bank of N. M. Rothschild & Sons Limited, where he worked closely with Lord Victor Rothschild KCMG GC at a time when he was Head of the UK Government Think Tank. Mark was a director of the Guernsey Bank and of Rothschild's Trust Companies, where he commenced working on offshore and international taxation as well as UK taxation from 1971.

## Registration Form. Please fax to (65) 6337 7546

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