

M I A M I

Spring International Conference - May 5-7, 2014

The TAG Alliances™



A Worldwide Alliance of
Independent Law Firms



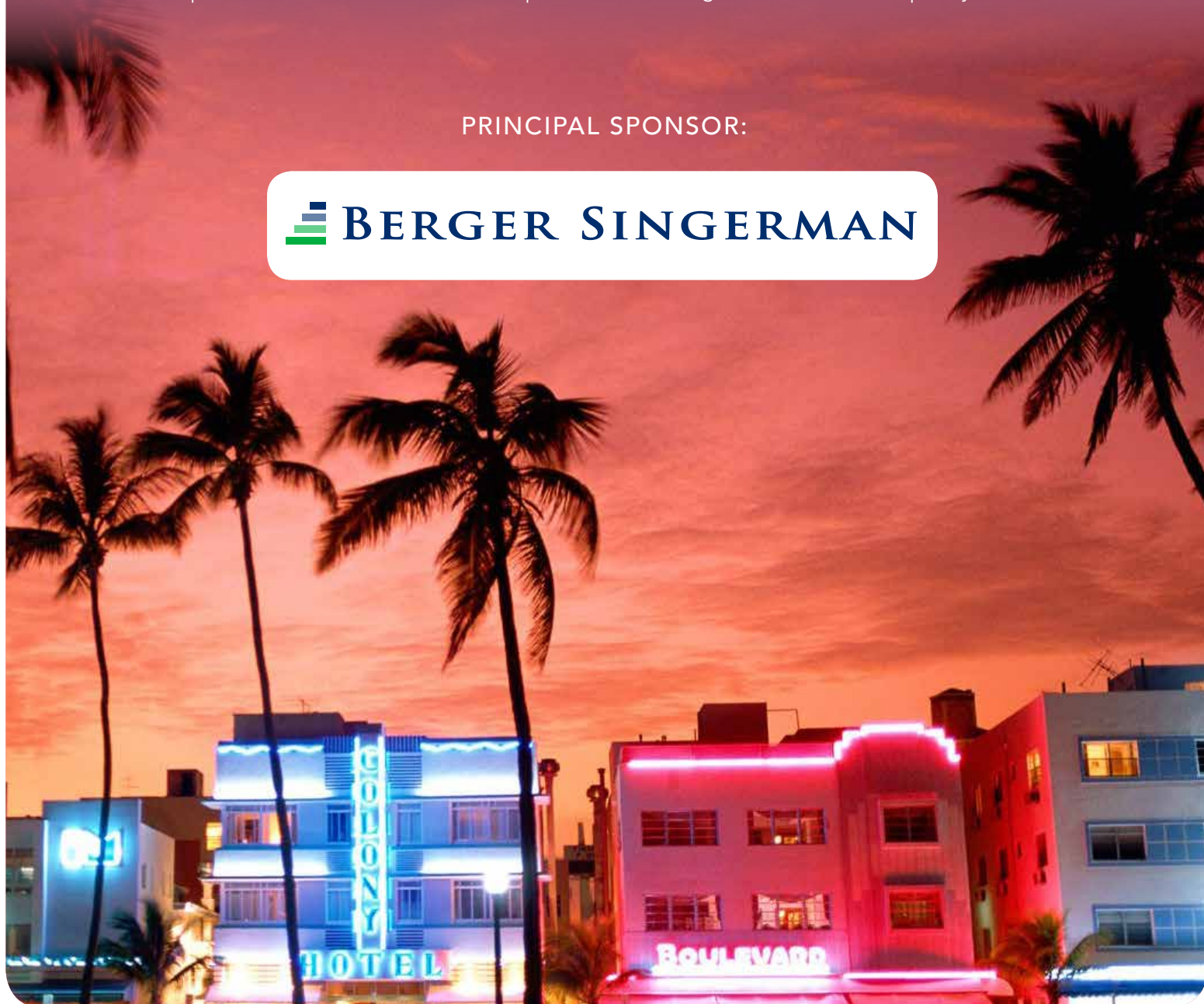
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WELCOME TO MIAMI!



Dear TAGLaw®, TIAG® and TAG-SP™ Members:

A warm Florida welcome to all of our members from around the world.

We know; with its sun, its beaches, its sights and its vibe, Miami may be a difficult location in which to hold a business meeting. That's why we have networking and social events as well as outstanding educational topics, speakers, and panels. And with 30 TAG conferences as a guide, we know that we will increase the energy of the city.

Miami is an important gateway city as well. It is a leading city for international commerce and is nicknamed "The Capital of Latin America". In recognition of that, we are spotlighting our Latin American members with banners, with special lanyards, and with a keynote address from a former U.S. Ambassador with several Latin American postings. I encourage you to take the time to listen, to learn, and to deepen your connections to our Latin American members; your clients will likely be asking about opportunities in that part of the world.



Our other sessions, plenary and specialty group, offer a wealth of information to keep you a leader in your market. Innovation, risk management, email security, cloud computing, firm retreats and advising high net worth clients are only some of the programs.

We are also offering unique shirts and caps for TAG Foundation contributions. Additionally, The Appleton Group will donate \$20 to the TAG Foundation for each TAG Alliances Success Story we receive from conference attendees.

Of course, it is all of you who make our conferences so memorable. Deepen your friendships, develop new relationships, and integrate your TAG Alliances membership into your firm's client service offerings.

Special thanks to our TAGLaw host firm, Berger Singerman (Florida); our opening cocktail reception sponsor, Collins Barrow Toronto and to our program advertiser, Kraft Kennedy.

My thanks as well to the entire TAG team for their tireless efforts in planning the conference. If this is your first time attending, please be sure to meet our staff.

Enjoy your visit to Miami and, most importantly, your involvement with your TAG Alliances colleagues.

Robert U. Sattin
President
The Appleton Group, Inc.

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Download session notes and materials at:
tagalliances.com/conference

CPE and CLE Credit

Please write your information on the sign-in sheet for each session you attend in order to receive certification of your attendance. The TAG Alliances do not grant CPE or CLE accreditation directly. Members must apply to receive credit from their respective jurisdictions

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AGENDA



SUNDAY, MAY 4 (Advisory Board Meeting Schedule)

9:00 a.m. – 9:30 a.m.	TIAG Board Breakfast (<i>Flash Room</i>)
9:30 a.m. – 11:30 a.m.	TIAG Board Meeting (<i>Flash Room</i>)
11:30 a.m. – 2:30 p.m.	TAGLaw and TIAG Joint Board Meeting and Lunch (<i>Shimmer Room</i>)
2:30 p.m. – 4:30 p.m.	TAGLaw Board Meeting (<i>Flash Room</i>)

MONDAY, MAY 5

8:00 a.m. – 10:00 a.m.	Registration (<i>Flicker Foyer</i>)
9:15 a.m. – 4:00 p.m.	<p>Early Bird Tour: The Flavor of South Florida (<i>Meet in the hotel lobby convention side by the North Drive entrance at 9:15 a.m. and return by 4:00 p.m.</i>)</p> <p>Everglades / Little Havana Lunch / Miami City Tour / Coconut Grove</p> <p>Take an informative and exciting adventure through Calle Ocho, Coral Gables, Coconut Grove and Downtown Miami, with shopping/touring time in the renowned Coconut Grove. Enjoy a lunch of fresh, authentic, delicious Cuban cuisine with a major dash of Cuban personality & chutzpah at Versailles Restaurant.</p> <p>Later, make your way through the Everglades' lush vegetation aboard an airplane propeller powered airboat. This thrilling airboat ride takes you to the legendary Everglades National Park, recognized as the most unique ecosystem in the world. Here you may see a variety of indigenous species, including the elusive alligator in its natural habitat.</p> <p>Following the Airboat tour you'll visit the Alligator Farm, home to nearly 200 gators. A 15 to 20 minute educational show features a local naturalist who will inform guests about the Florida Alligator, Otter, Owl and other wildlife found here in South Florida and the tropics.</p> <p>Dress: Guests should wear comfortable shoes and clothing.</p> <p>Price for members and guests: \$192.00 (USD)</p>
4:00 p.m. – 6:00 p.m.	TIAG Latin America Meeting (<i>Flash Room</i>)
4:30 p.m. – 6:30 p.m.	Registration (<i>Flicker Foyer</i>)
6:30 p.m. – 7:30 p.m.	Cocktails (<i>Ocean Lawn</i>)
7:30 p.m. – 10:00 p.m.	<p>Welcome Dinner (<i>Flicker Room</i>)</p> <p>Now that everyone has arrived in Miami, it is time to kick off the week with cocktails and enjoy a wonderful dinner with old and new friends.</p> <p>Dress: Men - Business or business casual Women - Business, business casual or cocktail attire.</p> <p>Price for members: FREE Price for guests: \$175 (USD)</p>



TUESDAY, MAY 6

8:00 a.m. – 9:00 a.m.	Networking Breakfast (<i>Flicker Foyer</i>)
9:00 a.m. – 9:15 a.m.	<p>Welcome (<i>Flicker Room</i>)</p> <p>A welcome to the Miami conference from Bob Sattin, President of the TAG Alliances.</p>
9:15 a.m. – 10:00 a.m.	<p>TAG Alliances Advisory Board Report (<i>Flicker Room</i>)</p> <p>The TAG Alliances' Advisory Boards report on the state of the alliance and new initiatives and respond to your questions.</p>

AGENDA

(Continued - Tuesday, May 6)



9:45 a.m. – 3:00 p.m.

Guest Tour: Art Deco Bus Tour followed by South Beach Walking & Food Tour (*Meet in the hotel lobby convention side by the North Drive entrance at 9:45 a.m. and return by 3:00 p.m.*)

We will take you throughout the Art Deco District which encompasses many blocks of the South Beach area. You will encounter the country's largest collection of Art Deco architecture in Miami Beach. There are approximately 800 significant buildings, which are listed with the National Register of Historic Places. Reminiscent of Spain, Italy, France and Morocco, these buildings feature decorative columns, arched windows, clay barrel tile roofs as well as the modern interpretation, including architecture emulating planes, trains, and automobiles using materials such as aluminum, chrome, neon lighting and glass block. After the bus tour you will continue your tour up-close & personal via foot, while tasting some delicious cuisine. From five-star gourmet to hole-in-the-wall delicious, you will taste the best cuisine of Miami's melting-pot with its predominately Latin, European, and comfort American influences.



Dress: Guests should wear comfortable shoes and clothing.

Price for guests: \$214.00 (USD)

10:00 a.m. – 10:30 a.m.

Break (*Foyer*)

10:30 a.m. – 11:30 a.m.

Not Your Father's Latin America: the Hot Spots, Lots More Cool Ones, and the Sleepers (*Flicker Room*)

John F. Maisto, Ambassador (ret.)

As the former U.S. ambassador to the Organization of American States, Venezuela, and Nicaragua, Senior Director for the Hemisphere at the National Security Council, and four other postings in Latin America, Ambassador Maisto knows that Latin America is a region of thriving market economies and predominantly western-style governments. Free trade agreements have resulted in trade and investment opportunity. Miami is the perfect place to hear about the new Latin America: current exciting markets, the challenges of populism, future trends, what to know and what to watch for.

11:30 a.m. – 12:30 p.m.

You are Where You are Going, Not Where You Have Been (*Flicker Room*)

Benjamin Sywulka, IXL Center

Ben Sywulka has been described by a TAGLaw member who heard him as, "the best speaker I've ever heard". He makes today's thoughts into tomorrow's practices and will provide a template for how to create a dynamic, market leader from a firm of professionals. Taking into account lessons learned from some of the top innovation firms working with Fortune 500 companies in the past few decades, Ben will be speaking on why innovation is important to law firms and accounting firms, what innovation is in this context, and how to innovate more effectively.

12:30 p.m. – 2:00 p.m.

Lunch

2:00 p.m. – 3:00 p.m.

Two Sessions, Choose One:

The Importance of Email Security (*Flicker Room 1*)

Moderator: Richard Attisha, Harper Grey LLP (Vancouver, Canada - TAGLaw)

Panelists:

- Dr. Einar Mykletun; Security and Compliance Architect, Identillect Technologies
- Paul Webster; Mercer & Hole (London, England - TIAG)
- Bernard (Berney) Kubetz; Eaton Peabody (Maine, USA - TAGLaw)

Have you ever stopped to consider your liability to clients and customers if unintended recipients gain access to private information that is being transmitted openly over the Internet? Email hacking and the disclosure/misuse of sensitive information happens all the time. Any email sent through regular means is vulnerable to such exposure.

Most professionals today are just starting to understand the real risk of sending and receiving unsecure email in the era of cloud computing and mobile networks. Join this panel of experts from both the legal and technical world as they show the whys and hows of securing your clients' data-- and your firm.

(See next page for additional session.)

AGENDA

(Continued - Tuesday, May 6)



Strategies for Serving and Protecting High Net Worth Clients (*Flicker Room*)

Moderator: David Neighbors, GALLINA, LLP (Northern California, USA - TIAG)

Panelists:

- Jude Coard; Berdon LLP (New York, New York, USA - TIAG)
- Adisa Bakari; Kelley Drye (Washington, D.C., USA - TAGLaw)
- Mark Lindley; Boodle Hatfield (London, England - TAGLaw)
- Hilton Bell; Milling Benson Woodward L.L.P. (Louisiana, USA - TAGLaw)

High net worth clients are just like us, except they're different. They could be athletes, entertainers, Silicon Valley entrepreneurs, or heirs to fortunes that have spanned generations. Often they have assets in, or ties to, multiple jurisdictions. With constantly changing tax laws around the world, these clients need to know how to protect their wealth, for, and sometimes from, future generations. The pitfalls are many, from wastefulness to government taxes to divorce. Please join this panel of TAG Alliance members who work with high net worth individuals as they highlight the potential risks for their clients, certain strategies they employ to protect their clients' wealth, and how to coordinate the roles of the professionals.

3:00 p.m. – 3:30 p.m.

Break (*Foyer*)

3:30 p.m. – 5:00 p.m.

Specialty Groups Sessions (*All groups are open to all TAG Alliances members*)

Audit & Assurance (*Breeze room*)

Topic: Issues Raised by Regulators on the Conduct of Audits

Please join the Audit & Assurance Group to discuss the findings by PCAOB (USA) and QAD (UK) regarding the conduct of audits.

Co-Chairs:

- Paul Webster, Mercer & Hole Chartered Accountants (London, England - TIAG)
- Robert Reitman; Cornick, Garber & Sandler (New York, New York, USA - TIAG)

Corporate and M&A (*Flicker Room*)

Topic: Cross Border Transactions

Recent Trends in Cross-Border M&A Transactions; The Importance of Due Diligence and Effective Use of Local Counsel

Co-Chairs:

- Anthony Adler; Mitchell Silberberg & Knupp LLP (Los Angeles, California, USA - TAGLaw)
- Bernhard Welten; Hodler Rechtsanwälte (Berne, Switzerland - TAGLaw)
- Enrique González Calvillo; González Calvillo, S.C. (Mexico - TAGLaw)

Firm & Practice Management (*Flash Room*)

Topic: Advancing Your Innovation Strategy

Presenter: Benjamin Sywulka, IXL Center

Committing to a culture of innovation for your firm is only the first step. Now, you have to challenge yourself and your colleagues to look at problems from different perspectives and see things in new ways. In this workshop, Ben Sywulka will work with firm leaders during a mini-innovation workshop to help them identify the big growth areas that they should focus on.

Co-chairs:

- Richard Few; Smith Moore Leatherwood (South Carolina, USA - TAGLaw)
- Robert Levy; Kuit Steinart Levy LLP (Manchester, England - TAGLaw)

IP/IT & Life Sciences (*Flicker Room 1*)

Topic: Opportunities and challenges in storing, using and protecting intellectual property and other proprietary data in "the Cloud"

Co-Chairs:

- IP/IT: Mark Thomas; Williams Mullen (North Carolina & Virginia, USA - TAGLaw)
- IP/IT: Gábor Germus; Germus and Partners (Hungary - TAGLaw)
- Life Sciences: Barbara Rummel; Lindquist & Vennum PLLP (Colorado, Minnesota & South Dakota USA - TAGLaw)
- Life Sciences: Paul Tauber; Coblenz, Patch, Duffy & Bass LLP (San Francisco, California, USA - TAGLaw)

AGENDA

(Continued - Tuesday, May 6)



TAG Property *(Bubble Room)*

Topic: Commercial Property Real Estate

Presenter: Tere Blanca, CEO, Blanca Commercial Real Estate, Inc.

Tere Blanca, president and chief executive officer of Blanca Commercial Real Estate, Inc., will lead a discussion on commercial property real estate markets.

Co-Chair: Christoph Klose; RWP Rechtsanwälte (Düsseldorf, Germany - TAGLaw)

TAG Tax *(Shimmer Room)*

Topic: Q&A Session with High Net Worth Panelists

Presenter: David Neighbors, GALLINA, LLP (Northern California, USA - TIAG)

Have a question about serving wealthy clients that you didn't have a chance to ask? Looking for an answer or guidance on a particular issue you're facing? Join panelists from our plenary session on serving high net worth clients in this special informal session for a question and answer exchange.

Co-Chairs:

- Pascal Schultze; GGV Grützmacher / Gravert / Viegner (Frankfurt, Germany - TAGLaw)
- Conrad Garcia; Williams Mullen (Richmond, Virginia, USA - TAGLaw)
- Lisa Spearman; Mercer & Hole (London, England - TIAG)
- Saul Brenner; Berdon LLP (New York, New York, USA)

5:45 p.m. – 10:30 p.m.

Villa Vizcaya Gala Dinner *(Meet in the hotel lobby convention side by the North Drive entrance at 5:45 p.m. and return by 10:30 p.m.)*

Once the winter home of James Deering, a founder of the International Harvester Company, the 10 acres of formal gardens is unmatched in the Western World outside Europe. The mansion was inspired by the great villas of Renaissance Italy and includes fine period furniture, textiles, sculpture and architectural elements from the 15th through the early 19th centuries.

A one-hour cocktail reception will take place on the South Terrace, which offers a splendid view of Vizcaya's formal gardens. After cocktails you will be escorted to the Main Courtyard for a seated dinner while listening to the background sounds of the Vizcaya's musical trio. Following the seated dinner you may enjoy coffee, cordials and dessert on the East Terrace, overlooking Biscayne Bay.

Dress: Cocktail attire

Price for members: FREE

Price for guests: \$220 (USD)



WEDNESDAY, MAY 7

8:00 a.m. – 9:00 a.m.

Networking Breakfast *(Flicker Foyer)*

9:00 a.m. - 9:15 a.m.

Opening Comments and Preview of Hong Kong *(Flicker Room)*

9:15 a.m. – 12:00 p.m.

Guest Tour: Little Havana Walking & Food Tour *(Meet in the hotel lobby convention side by the North Drive entrance at 9:15 a.m. and return by 12:00 p.m.)*

Learn about the area's history and culture while tasting Cuban foods that have been prepared by the same families from recipes handed down through generations. Meet local artists, watch cigar rollers, take a peek at Domino Park – all while getting the insights of a vibrant Miami neighborhood. This guided, narrated food tour is both a cultural and a culinary experience.

Dress: Guests should wear comfortable shoes and clothing.

Price for guests: \$164.00 (USD)



AGENDA

(Continued - Wednesday, May 7)



9:15 a.m. – 10:45 a.m.

Specialty Group Sessions

Best Practices (*Flicker Room*)

Topic: Advancing by Retreating: Structuring a Productive Partners' Retreat

Presenter: Allan Koltin, President & CEO, Koltin Consulting Group

The annual partners' retreat is a ritual at most accounting firms throughout the world. There is an opportunity here for firms to refocus and re-energize their efforts for the year, but there is also a risk that bad habits or a poor strategy may be reinforced. Join Allan Koltin, one of the most influential and respected accounting consultants in the USA, as he gives firm leaders tips on structuring a successful partners' retreat.

Attendees will learn:

- How to prepare for a retreat
- How to get retreat participants to openly discuss key issues
- How to build a follow up plan

Co-Chair: Kurt Baker; ESV Chartered Accountants (New South Wales - TIAG)

Employment and Labor (*Bubble Room*)

Topic: Employment Practices Liability Insurance (EPLI) Policies

We will be continuing our discussion pertaining to Employment Practices Liability Insurance (EPLI) policies and explore the possibility of having an insurance provider develop policies that are friendlier to both our clients and their law firms.

Co-chairs:

- Larry Drapkin; Mitchell Silberberg & Knupp LLP (Los Angeles, California, USA - TAGLaw)
- Danielle Muller; Rassers Advocaten (Breda, Netherlands - TAGLaw)

Insolvency / Litigation & ADR (*Flash Room*)

Topic: Can't We All Just Get Along? Adventures in Cross-Border Insolvency Proceedings

We will meet for a panel discussion about how Chapter 15 & UNICTRAL's model law on cross-border insolvency work together, and to plan further group activities for the fall conference.

Co-chairs:

- Insolvency: Andrew (Andy) Turner; Conner & Winters, LLP (Oklahoma, USA - TAGLaw)
- Insolvency: Deborah Williamson; Cox Smith Matthews Incorporated (Texas, USA - TAGLaw)
- Litigation & ADR: Alex Lever; Nysingh advocaten-notarissen N.V. (Apeldoorn, Netherlands - TAGLaw)
- Litigation & ADR: Michael Penman; Blaney McMurtry LLP (Ontario, Canada - TAGLaw)
- Litigation & ADR: Dan Waite; Lewis Roca Rothgerber LLP (Nevada & New Mexico, USA - TAGLaw)

TAG Tax (*Flicker Room 1*)

Topic: Bridging the Gap: What American Businesses Need to Know About Brazil

Brazil is one of the fastest growing economies in the world, and many American businesses are looking to establish themselves in this growing market. The lack of a tax treaty between Brazil and the USA makes doing business in this country a major challenge for U.S. businesses, however. Please join Nick Jovanovich of Berger Singerman and his panel of TAG Tax Specialty Group members to see what solutions they propose for creating, safe, tax-efficient structures for American businesses operating in Brazil.

Co-Chairs:

- Pascal Schultze, GGV Grützmacher / Gravert / Viegner (Frankfurt, Germany - TAGLaw)
- Conrad Garcia; Williams Mullen (Virginia, USA - TAGLaw)
- Lisa Spearman, Mercer & Hole (London, England - TIAG)
- Saul Brenner; Berdon LLP (New York, New York, USA)

10:45 a.m. – 11:15 a.m.

Break (*Flicker Foyer*)

11:15 a.m. – 12:15 p.m.

What Truly Makes for Great Firms, Great Partners and Great Leaders? (*Flicker Room*)

Allan Koltin, President & CEO, Koltin Consulting Group

Imitation is high praise. That is why so many law firms are looking at the accounting firm model for governance and structure. What makes these firms so profitable and successful and what can law firms and other accounting firms learn? Find out from the expert, Allan Koltin. Allan has been named as one of the Top 100 Most Influential People in the accounting profession 11 consecutive years by Accounting Today and one of the 10 Most Recommended Consultants 7 consecutive years by INSIDE Public Accounting.

12:15 p.m. – 1:30 p.m.

Lunch (*Alfred Portale's Gotham Steakhouse Restaurant*)

AGENDA

(Continued - Wednesday, May 7)



1:30 p.m. – 2:30 p.m.

Two Sessions, Choose One:

Anatomy of a Financial Institution Failure (*Flash Room*)

Moderator: James Berger, Berger Singerman (Florida, USA - TAGLaw)

Panelists:

- Steve Boyles; Hemming Morse (San Francisco, California, USA - TIAG)
- Keith May; Richey May (Colorado, USA - TIAG)
- James Gassenheimer; Berger Singerman (Florida, USA)
- Tom Hugo Ottesen; Kvale Advokatfirma DA (Norway - TAGLaw)

When a financial institution fails, there is certainly blame to be assigned. Often, the legal and accounting advisors are among those who could have, would have, should have done something better or differently. Listen to this panel of TAGLaw and TIAG members as they analyze an actual case study; you will become a better advisor to your clients as you gain important lessons on anticipating the key issues, and addressing them with insight and expertise.

Doing Business in the Cloud: Managing the Risks and Opportunities of Modern Business in the Cloud (*Flicker Room*)

Moderator: Lisa Spearman, Mercer & Hole (London England - TIAG)

Panelists:

- Greg Bryant; BILTgroup
- Dennis Duquette; Red Hat
- Barry Nijkamp; Van Elderen (Apeldoorn, Netherlands - TIAG)
- Basil Bielich; Browne, Craine & Co. (Isle of Man - TIAG)

Business is being done in the Cloud, but laws and regulations are enacted and enforced on the ground. The Cloud present risks and opportunities for cross-border transactions not previously anticipated by businesses. These challenges include: where taxes should be paid, how businesses should be structured, and how trade secrets and other intellectual property can be used and protected. Listen and learn as this panel discusses these issues and more from a law and accounting perspective.

3:00 p.m. – 5:30 p.m.

Networking Tour: HistoryMiami (*Meet in the hotel lobby convention side by the North Drive entrance at 3:00 p.m. and return by 5:30 p.m.*)

Discover the fascinating past and dynamic present of South Florida and the Caribbean at the Historical Museum of Southern Florida. Explore 10,000 years of history as you wander through the museum's permanent exhibition, Tropical Dreams: A People's History of South Florida. Visit a re-creation of the National Historic Landmark, Miami Circle and view artifacts from this 2,000 year-old settlement. Walk through the homes of Seminole Indians and settlers in South Florida and climb aboard an actual 1920s trolley.

The Museum of HistoryMiami gathers, interprets, and presents the history of Miami and the greater South Florida region as a cultural crossroads of the Americas. Through exhibitions, collections, and publications, the museum offers its visitors meaningful ways to connect to the rich past and ever-evolving future of the region and its diverse inhabitants.

Price for members: FREE

Price for guests: \$82.00 (USD)



6:15 p.m. – 9:30 p.m.

Networking Dinner: Lucky Strike Bowling (*Meet in the hotel lobby convention side by the North Drive entrance at 6:15 p.m. and return by 9:30 p.m.*)

Lucky Strike is the creation of Steven and Gillian Foster, delivering the best interactive experiences around. Lucky Strike is regularly recognized in the media as the nation's first truly upscale bowling lounge. It has also been featured on Access Hollywood, E! Entertainment, MTV, ESPN, and Fox as a magnet for celebrities.

Having introduced to the industry the field of "boutique bowling" – Lucky strike offers upscale hip bowling and entertainment with quality food, dramatic ambience, a hot bar, a private lounge and a sophisticated A/V system programmed with sports, media and art.

Dress: Casual

Price for members and guests: \$165.00 (USD)



TUESDAY, MAY 6



JOHN MAISTO AMBASSADOR (RET.)

Presenter: *Not Your Father's Latin America: the Hot Spots, Lots More Cool Ones, and the Sleepers*

Ambassador (ret.) John Maisto, is a thirty-three year former career member of the U.S. Foreign Service. He was Ambassador to Venezuela (1997-2000), Nicaragua (1993-1996), and the Organization of American States (2003-2006). He was Senior Director for the Western Hemisphere at the National Security Council and, concurrently, Special Assistant to the President, 2001 to 2003. He was Foreign Policy Adviser at the U.S. Southern Command, Deputy Assistant Secretary of State for Central America, and he served in Argentina, Bolivia, Costa Rica, Panama, and the Philippines. His Philippine service was in Manila as Political Officer (1978-1982), and at the State Department as Deputy Director and then Director of Philippine Affairs, 1982-1986, during the People Power transition to democracy.

He is currently a Director of the Miami-based U.S. Education Finance Group and of the Washington-based International Student Exchange Program (ISEP). He is a Director of ECI, a Central America-based resort and retirement company. He is also a Consultant on Global Affairs at Arizona State University, Member of the Board of Advisers of the Washington-based Inter-American Dialogue, and Chair of the Board of Advisors of the American Committees on Foreign Relations (ACFR) in Washington. He writes and speaks on U.S. foreign policy; trade, investment and growth; democratic transitions; Western Hemisphere and East Asia-Pacific regional issues; security and defense matters; and international education. A graduate of Georgetown University's School of Foreign Service, he has a Master's Degree in Latin American History from San Carlos University, Guatemala. He is married to Maria Consuelo Gaston of Manapla, Negros Occidental, the Philippines; they have three children and five grandchildren.



BENJAMIN SYWULKA DIRECTOR OF INNOVATION, IXL CENTER

Presenter: *You are Where You are Going, Not Where You Have Been*

Benjamin Sywulka is already recognized by many TAGLaw members as one of the best speakers they have ever heard. His talks on innovation engage audiences around the world and help professionals bring creative thinking to their firms and businesses. Ben is the Director of Innovation at the Private Competitiveness Council of Guatemala. With twelve years of experience in the technology industry, he possesses a wide range of skills, such as web development, software design, network security management, and Enterprise Resource Planning software implementation.

After completing his undergraduate degree at Stanford and working with several Silicon Valley companies, including Altavista, Google and Boeing, Benjamin became Director of Planeta en Línea, a non-profit focused on rural technology development. During his time there he successfully incubated several technology-based social enterprises in rural Guatemala, including a local TV channel, an Internet service provider and a web-design company. Benjamin later joined Alexius International, a consulting firm specializing in Information and Communication Technology for International Development. During his time there, he implemented projects throughout Latin America ranging from rural telecommunications and government modernization to corporate software deployment.

Benjamin has a B.S. in Symbolic Systems from Stanford University, an MBA, and a Master in Finance degree from Hult International Business School. He is a speaker at information technology conferences, a guest-lecturer at schools and universities, and leads and facilitates innovation workshops.

TUESDAY, MAY 6



RICHARD ATTISHA HARPER GREY LLP (BRITISH COLUMBIA, CANADA - TAGLAW)

Moderator: *The Importance of Email Security*

Richard Attisha is a partner and chair of our Employment Law Group. Richard is also an active member and past chair of our Commercial Litigation Group and Environmental Law Group.

He acts for banks in the commercial collections area and has represented a number of large creditors in CCAA proceedings. Richard also provides advice and acts as counsel with respect to corporate and commercial disputes including creditor/debtor, banking, real estate, contract and tort litigation, environmental law matters including contaminated site issues and environmental offences and employment and labor law matters including HR advice, wrongful dismissal, restrictive covenant disputes and labor grievances (for management).

Richard is a former member of Canada's national rugby team and lives in Vancouver with his wife and four children.

Session Panelists: *The Importance of Email Security*



Dr. Einar Mykletun

Security and Compliance
Architect, Identillect Technologies



Paul Webster

Mercer & Hole
(London, England - TIAG)



Bernard (Berney) Kubetz

Eaton Peabody
(Maine, USA - TAGLaw)

TUESDAY, MAY 6



DAVID NEIGHBORS GALLINA, LLP (NORTHERN CALIFORNIA, USA - TIAG)

Moderator: *Strategies for Serving and Protecting High Net Worth Clients*

David Neighbors is a partner in GALLINA LLP's Silicon Valley Tax Practice and has more than 20 years of business experience in Silicon Valley specializing in corporate and individual tax compliance and planning. He has experience in the areas of compensation planning, start-up and emerging growth issues, mergers and acquisitions, accounting for income taxes, research credits and stock option planning.

Prior to joining GALLINA, David was with KPMG Peat Marwick and Ernst and Young in San Jose. He works with high net worth individuals, closely held businesses, partnerships, limited liability companies, nonprofit organizations and fiduciaries. An area native, David graduated from San Jose State University with a B.S. degree in Business with an Accounting emphasis and a M.S. degree in Taxation.

David is involved in many professional and civic organizations in the community. He is an active member of the AICPA and Past President of the Silicon Valley/San Jose Chapter of the California Society of Certified Public Accountants. He is a member of the adjunct faculty at San Jose State University's Lucas Graduate School of Business and a member of the Board of Trustees for The National Hispanic University Foundation and the Beta Alpha Psi Scholarship Committee at San Jose State University. Additionally, he has served on the Governing Board of the Berryessa Union School District and on the East Side Union High School District's Audit Committee. He regularly volunteers his time helping local non-profit organizations with their annual tax filings and has served as a board member of the Big Brothers and Sisters of Santa Clara County and Alum Rock Counseling Center.

Session Panelists: *Strategies for Serving and Protecting High Net Worth Clients*



Jude Coard

Berdon LLP (New York, New York, USA - TIAG)



Adisa Bakari

Kelley Drye
(Washington, D.C. - TAGLaw)



Mark Lindley

Boodle Hatfield (London, England - TAGLaw)



Hilton Bell

Milling Benson
Woodward L.L.P.
(Louisiana, USA - TAGLaw)

WEDNESDAY, MAY 7



ALLAN KOLTIN PRESIDENT & CEO, KOLTIN CONSULTING GROUP

Presenter: *What Truly Makes for Great Firms, Great Partners and Great Leaders?*

A nationally recognized speaker and industry analyst, he has appeared on the CNN, WGN and Fox Television networks and has been quoted frequently in such media as the Wall Street Journal, New York Times, Washington Post, Chicago Tribune, Los Angeles Times, USA Today and New York Post, as well as Bloomberg News, BBC World Service, Business Week, Forbes and Reuters. He has also spoken nationally and internationally at hundreds of conferences including those held by the AICPA, international CPA associations and state CPA societies.



JAMES BERGER BERGER SINGERMAN (FLORIDA, USA - TAGLAW)

Moderator: *Anatomy of a Financial Institution Failure*

James L. Berger is Managing Partner of Berger Singerman LLP, Florida's business law firm. He manages the firm's four offices in Miami, Fort Lauderdale, Boca Raton and Tallahassee. As a real estate lawyer, James represents both lenders and developers in real estate restructuring matters and lenders, buyers and sellers in multimillion-dollar, complex loan transactions and refinancing. He is ranked in Chambers & Partners USA, and listed in The Best Lawyers in America, South Florida Legal Guide and Florida Super Lawyers.

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LISA SPEARMAN MERCER & HOLE (LONDON, ENGLAND - TIAG)

Moderator: *Doing Business in the Cloud: Managing the Risks and Opportunities of Modern Business in the Cloud*

Lisa Spearman's clients come from all walks of life and she works closely with them to understand their motivations in order to make the best possible arrangements for their own, their families' and their businesses' financial interests. Lisa has over 20 years experience of advising high net worth individuals. Her skill at tax planning, together with her knowledge of capital gains tax and inheritance tax matters allows Lisa to advise on a broad range of tax and trust issues.

In addition, Lisa is an acknowledged expert on the tax consequences of offshore trusts, and residence and domicile issues and leads Mercer & Hole's specialist team that focuses on non-UK domiciled clients. She is Chairman of the ICAEW Tax Faculty's, Private Client Committee and within that leads the working party on non domicile and residence matters. Lisa is also a member of the ICAEW Tax Faculty technical committee. Lisa is a regular contributor to TAXline Tax Planning and has had chapters published on both non-residence and inheritance tax. Lisa also writes for the firm's Tax Plus blog.

Session Panelists: *Doing Business in the Cloud: Managing the Risks and Opportunities of Modern Business in the Cloud*



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NOTES



Download session notes and materials at:
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A wide-angle, nighttime photograph of the Hong Kong skyline. The city is densely packed with illuminated skyscrapers and buildings, reflecting on the water of the harbor. The sky is a deep blue. The title text is overlaid in the upper portion of the image.

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A wide-angle, daytime photograph of the Edinburgh skyline. In the foreground, a large, classical stone monument with columns stands prominently. The background shows the city of Edinburgh with its historic architecture, including the Edinburgh Castle on a hill. The title text is overlaid on the right side of the image.

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*"To be doing good deeds is
man's most glorious task."*

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