

INTERNATIONAL FUNDRAISING TAX AND LEGAL CONSIDERATIONS: UK, INDIA, AND HONG KONG

Session 1: The United Kingdom

Monday, July 11, 2011 :: 1:00 – 2:15 p.m. EDT

Session 2: India

Monday, July 18, 2011 :: 1:00 – 2:15 p.m. EDT

Session 3: Hong Kong

Monday, July 25, 2011 :: 1:00 – 2:15 p.m. EDT

ACADEMIC · IMPRESSIONS

WEB CONFERENCE



INTERNATIONAL FUNDRAISING TAX AND LEGAL CONSIDERATIONS: UK, INDIA, AND HONG KONG

July 11, 18 & 25, 2011

OVERVIEW

With the balance of wealth shifting overseas, the future of philanthropy is poised to take on a much more global face. However, legal and tax hurdles can stop the most well-planned international effort before it has even started.

Join us online to learn how to overcome those hurdles and to assess, on a technical basis, if an international effort in Hong Kong, India, or the UK is sensible for your institution. With a session dedicated to each country, you will learn the answers to the following questions:

- What legal barriers need to be considered when fundraising in the UK/India/Hong Kong?
- How can Americans living abroad in the UK/India/Hong Kong receive tax benefits?
- How can UK/India/Hong Kong foreign nationals receive in-country tax benefits?
- Money transfer vehicles to call upon
- Upcoming potential issues to keep in mind for the UK/India/Hong Kong

LEARNING OUTCOME

After attending this webcast, you will be able to use a critical legal and regulatory review to lay the foundation for a possible fundraising effort in three international locations.

WHO SHOULD ATTEND

This event is designed for advancement services managers, counsels, and finance professionals.

SESSION 1: THE UNITED KINGDOM

MONDAY, JULY 11, 2011 :: 1:00 – 2:15 P.M. EDT

AGENDA

- Legal considerations
- Obtaining tax benefits
 - For the foreign citizen
 - For the US citizen
- Transactional vehicles and methods
- Prospective changes and trends

SESSION 2: INDIA

MONDAY, JULY 18, 2011 :: 1:00 – 2:15 P.M. EDT

AGENDA

- Legal considerations
- Obtaining tax benefits
 - For the foreign citizen
 - For the US citizen
- Transactional vehicles and methods
- Prospective changes and trends

SESSION 3: HONG KONG

MONDAY, JULY 25, 2011 :: 1:00 – 2:15 P.M. EDT

AGENDA

- Legal considerations
- Obtaining tax benefits
 - For the foreign citizen
 - For the US citizen
- Transactional vehicles and methods
- Prospective changes and trends

What legal
and tax issues
should you
consider
before
fundraising in
Hong Kong,
India, and
the UK?



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INSTRUCTORS



Deidre O'Byrne, Partner, Withers Bergman, LLP

Deidre leads Withers Bergman's US Family and Business Planning Group, as well as its US Charities Group. She represents families in a broad range of estate planning and tax matters, including charitable giving, and advises fiduciaries on trust and estate administration and probate. Deidre's practice also involves advising charitable organizations on tax matters and corporate governance. She has presented on international tax issues at the FOX Fall Forum in 2009, and with Academic Impressions in 2010, and is a trustee for the Museum of the City of New York as well as a member of the Memorial Sloan-Kettering Cancer Center Trust and Estate Advisory Committee.



Erica Guyer, Associate, Withers Bergman, LLP

Erica's practice focuses on tax and estate planning. She has a particular emphasis on counseling individuals with respect to planned giving and advising charitable organizations on tax and governance matters, including their international fundraising efforts. She is also a member of the Non-Profit Organizations Committee of the New York State Bar.

LOGGING IN TO THE WEBCAST

After registration, each registrant will receive a confirmation of payment or an invoice, depending on method of payment. Each registrant will also receive an email with appropriate login information and more information regarding the event a few days prior to the start of the event. The day of the conference, you will receive another email with the same information. To participate, you will need a computer with a high-speed Internet connection. You will have the option to receive audio via your computer speakers or telephone.

WHAT IS A SINGLE SITE CONNECTION?

A site connection allows a single connection to the Web conferencing software and teleconference. We encourage you to set the event up in a conference room or classroom from a single computer in order to allow multiple stakeholders from your campus to participate. Remember, as long as only a single computer connects, you can bring as many people as you want to the event. Because there are no travel expenses and only a single registration fee is required, each additional participant lowers the cost per person significantly. Purchasing a site connection and inviting everyone involved in a particular topic is a great way to provide cost-effective professional development. Please note that you will have the option to receive audio via your computer speakers or telephone.

If for any reason a relevant stakeholder cannot co-locate for the session, we encourage you to include that person by purchasing an additional connection at the reduced fee of \$195 per session. This will ensure that every member of a team receives the same relevant, timely information in the most efficient way. If an interested party cannot participate at the designated time, or if someone would like to view the presentation again, an archived copy of the event will be available for 60 days. If you have any technical or purchasing questions, please contact us at 720.488.6800.



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Recommended CPE Credits: 4.5
(for completing each section)

Program Field of Study: Taxes
Specialized Knowledge and Applications: Group-Internet

Prerequisites: None
Program Level: Basic

CFRE Continuing Education Credits

Most Academic Impressions fundraising-related events are applicable for continuing education credits toward the CFRE International application for initial certification and/or recertification. This program is currently being considered for approval.

Continuing Legal Education (CLE) Credits

This program has been approved for Continuing Legal Education (CLE) credit in the state of Colorado. Academic Impressions' sponsor ID is 'acaimp'. The program has been approved for 5 general credits. Credit may be granted by states outside of Colorado, but credit decisions are at the discretion of individual state boards.



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REGISTRATION FORM

Make the most of the presentation: invite your whole team to participate from a single location at no additional cost. Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you. **Register online at www.academicimpressions.com**

REGISTRATION FEES

Single Site Connection: International Fundraising Tax and Legal Considerations: UK, India, and Hong Kong

- Three Sessions (BEST VALUE)** _____ \$900.00 USD
 Two Sessions Only Session One Session Two Session Three _____ \$650.00 USD
 One Session Only Session One Session Two Session Three _____ \$350.00 USD

Additional Site Connections: International Fundraising Tax and Legal Considerations: UK, India, and Hong Kong _____ \$195.00 per session
Session One, Quantity: _____ Session Two, Quantity: _____ Session Three, Quantity: _____

- Registrants receive a 50% discount on the CD-ROM recording of this webcast. Please send me the CD-ROM _____ \$450.00 USD
 Can't attend the live sessions? Please send me a CD-ROM recording of this webcast _____ \$900.00 USD
(For CD-ROM orders outside the United States and Canada, a \$35 international shipping fee will be added.)

Total amount enclosed or to be charged \$ _____

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.): _____

WEB CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name _____ Job Title _____
Institution/Organization _____ Address _____
City _____ State/Province _____ Zip/Postal Code _____ Country _____
Telephone _____ Fax _____ Email _____

(Additional contact information for registration confirmations and pre-conference communication.)

Additional Contact Name _____ Additional Contact Phone _____
Additional Contact Title _____ Additional Contact Email _____

FREE HIGHER ED NEWS AND ANALYSIS

Academic Impressions is happy to offer *Higher Ed Impact*, a free industry scan of news, trends, and fresh research on higher education, delivered in an easy-to-scan email.

- Sign me up for HEI: Daily Pulse** – impactful news, trends, and practices, sent daily
 Sign me up for HEI: Weekly Scan – the week's most critical news, with analysis of top stories and trends, sent on Fridays
 Sign me up for HEI: Monthly Diagnostic – practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

PAYMENT METHOD

We accept Visa, MC, and AmEx credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.741.0849 or mail form along with payment to: Academic Impressions, 4643 S. Ulster St. Ste. 350, Denver, CO 80237.

CREDIT CARD

Please charge my credit card: (Visa, MC, AmEx) _____
Name on Card _____
Account Number _____
Exp. Date _____ Billing Zip Code/Postal Code _____
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or 4 digits on front of AmEx)

CHECK/INVOICE

- My check is included and covers _____ registration(s)
Check # _____
 Please invoice me
Purchase Order # _____
(PO# not required to receive invoice)

REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by May 6, 2011. A \$75 processing fee will be assessed. After May 6, 2011 a credit (less \$75 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, Web conferences, audio proceedings, or Web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.

