

7TH ANNUAL HAWAII ACTEC FELLOWS PLANNING CONFERENCE



The Hawaii Fellows of the American College of Trust & Estate Counsel (ACTEC) *in conjunction with the HSBA Probate and Estate Planning and Elder Law Sections* present their
7th Annual Planning Conference



Bank of Hawaii

Speakers & Topics:

JOHN A. TERRILL II, ESQ.

What the FATF? And Why Do I Care?

JAMES D. LAMM, ESQ.

Saving My ASSETS: Time to Reboot Your Practice

TOMOKO NAKADA, ESQ.

Japan Inheritance Tax Laws Update

DATE: August 25, 2017

PLACE: YWCA—FULLER HALL 1040 Richards St. Honolulu, HI

Lunch courtesy of Bonhams 12:00-1:00 pm (must RSVP)

PROGRAM: 1:00-5:00 pm

Pupus and Cocktails to follow courtesy of Cadinha & Co.

Cost: **\$100.00 received by 7.25.17 / \$110.00 after 7.25.17**
Probate and Elder Law Section Members: **\$85.00 received by 7.25.17 / \$95.00 after 7.25.17**

3.25 hrs of HI CLE Credit (No Ethics)

4.0 hrs of CPA CPE Credit

(please return this portion with your payment)

Attendee #1: _____ Member: Probate: _____ Elder Law: _____

Attendee #2: _____ Member: Probate: _____ Elder Law: _____

Lunch (must RSVP) Attendee #1: Yes: ___ No: ___ Attendee #2: Yes: ___ No: ___

Address: _____ Phone: _____

Email #1: _____ Email #2: _____

Payment: \$ _____ () Check Enclosed (payable to *RANDALL M. L. YEE*)

() Via Credit Card (go to *www.randallyeelaw.com*)

Mail Registration Form to: *Randall M. L. Yee, 1000 Bishop Street, #908, Honolulu, Hawaii 96813*

Email: *randall@yklawhawaii.com* / Ph: 808.524.4501 / Fax: 1.888.524.0407 7th Annual ACTEC

JOHN A. TERRILL II, ESQ.



John A. Terrill, II is a Partner at Heckscher Teillon Terrill & Sager, PC in West Conshohocken, Pennsylvania. Mr. Terrill's practice largely focuses on estate planning for clients with complex assets, such as businesses, real estate, and other significant assets. He is a nationally recognized authority on asset protection planning, which involves estate planning with attention given to the preservation and protection of assets from undue exposure to litigation or other claims. His practice also includes charitable planning (particularly creating and operating foundations), estate settlement, and fiduciary litigation. He is also frequently engaged as an expert witness in matters involving estate and trust litigation. Mr. Terrill is a fellow of the American College of Trust and Estate Counsel where he currently serves as Vice President. He was the founding chair of ACTEC's Asset Protection Committee and is a member of the College's Asset Protection and Legal Education committees. He also formerly co-chaired ACTEC's Task Force on FATF (the Financial Action Task Force) and was ACTEC's Pennsylvania state chair from 2012 through 2015. He is a member of the American Bar Association and its Real Property, Trust & Estate Law, and Law Practice Management Sections; the Pennsylvania Bar Association and its Real Property, Probate, & Trust Law Section; the Philadelphia Bar Association; and the Philadelphia Estate Planning Council. He has been listed as a top trust and estate lawyer in Philadelphia's Best Lawyers, named a Pennsylvania Super Lawyer by Philadelphia Magazine, and received the highest rating for legal ability and ethical standards from LexisNexis Martindale-Hubbell Peer Review Rating. He continues to teach and speak on asset protection planning, the impact of FATF on law practice, and more. He is a graduate of Dartmouth College (A.B. magna cum laude 1973) and the University of Pennsylvania Law School (J.D. cum laude 1976).

JAMES D. LAMM, ESQ.



James Lamm is a third-generation Minnesota estate planning and tax attorney and a principal in Gray Plant Mooty's Trust, Estate & Charitable Planning group. James Lamm focuses his practice on estate planning, tax planning, family business succession planning, probate and trust administration, and charitable giving. James Lamm is nationally-known for his speaking and writing on advanced estate planning and tax topics, and he has been interviewed and quoted by The Wall Street Journal, The New York Times, Forbes magazine, The Hill, Intellectual Property Magazine, Kiplinger's Retirement Report, Investment News, Morningstar, Twin Cities Business magazine, the Pew Research Center, The Associated Press, Reuters, the Star Tribune, The Seattle Times, The Washington Post, MSNBC, KSTP television, KMSP television, National Public Radio, and more. James Lamm is a Fellow in the American College of Trust and Estate Counsel (ACTEC), and he's an Adjunct Associate Professor (2012 to 2015) teaching an Estate Planning and Drafting seminar at the University of Minnesota Law School. James Lamm blends a strong background in math, technology, and computers with his estate planning practice. James Lamm is a national thought leader in the area of estate planning for passwords and digital property, including electronic data, online accounts, intellectual property rights, and Internet domain names. James Lamm authors the Digital Passing blog, and he was the founding Chair of ACTEC's Digital Property Task Force. James Lamm also coauthored the proposal for and actively participated in the drafting of the Uniform Fiduciary Access to Digital Assets Act.

TOMOKO NAKADA, ESQ.



Tomoko Nakada is a special counsel with Hokusei Law Office, P.C. in Tokyo, Japan. Ms. Nakada's practice largely focuses on cross border estate planning for United States and Japanese clients. Ms. Nakada is an international fellow of the American College of Trust and Estate Counsel and is a member of the College's International Estate Planning committee. She is an academician of the International Academy of Estate and Trust Law. She is a member of the Japan Federation of Bar Associations (Nichibenren), Dai-ni Tokyo Bar Association, Japan Association of the Law of Trust, American Bar Association, New York Bar Association, The American College of Trust and Estate Counsel and the International Academy of Estate and Trust Law. Her previous experiences also include serving as a Tokyo District Judge. Her publications include: Navigating United States-Japan Estate Planning, International Inheritance Guidebook, and Dying with a Bad Will can be as Troublesome as Dying without a Will. She is a graduate of the University of Tokyo (Bachelor of Laws 1995) and New York University (L.L.M. 2001) and is admitted to practice in Japan and New York.