6:00pm:
Presentation Room A

6:00pm:
Presentation Room B

7:40pm: Panel Discussion

8:00pm: Cocktail Hour and Networking

MAR 22, 2017

AMERICAN FINANCIAL FORUM

AMERICAN CLUB OF BRUSSELS

+32 (0)476/996.870

www.americanclubbrussels.org

Interested in planning for your financial future?

Welcome to the 4th Annual American Financial Forum with the American Club of Brussels where we have several speakers lined up for you to address various finance topics relating to the personal financial situation of Americans who reside in Belgium.

AMERICAN FINANCIAL FORUM

6:00pm: Presentations Room A

6:00pm – 6:15pm: Dave Deruyter – Efficient Digital Banking for Expats. Smart and Secure Banking with Your Phone, Tablet or Laptop

6:20pm – 6:35pm: Lisa Festerling – US Tax Update for Overseas Individuals

6:40pm – 6:55pm: Wani Manly – US Wills and Trusts

7:00pm – 7:15pm: ? Also Marc maybe?

7:20pm – 7:35pm: Marc Quaghebeur – Estate Planning

6:00pm: Presentations Room B

6:00pm – 6:15pm: Brian Dunhill – Reducing Currency Risk in a US Portfolio

6:20pm – 6:35pm: Michael Larsen – US Banking from Abroad - Intro to the State Department Federal Credit Union

6:40pm – 6:55pm: Daniel Poelman– Bolero Crowdfunding and Startit

7:00pm – 7:15pm: Christelle Colairo– International Money Transfers

7:20pm – 7:35pm: Carl Mir – US Taxes

7:40pm Panel Discussion

Moderator: John Stuyck

Guest Panel: Brian Dunhill, Dave Deruyter, Michael Larsen, Lisa Festerling

8:00pm: Cocktail Hour and Networking

GUEST SPEAKERS

Dave Deruyter

Dave is the Head of Expat and Non-resident Services at ING Belgium. He is married to Kathlees, father of Liesbeth and Arthur. He is an international banker and ex-expatriate from Japan and China. He is also a speaker on Expat topics. He loves writing, traveling, hiking and skiing.

Brian Dunhill

Brian is a financial planner with a core emphasis on concentrated positions, and retirement planning for predominantly American Expatriates. Past positions have led him to work in many capacities for prestigious firms on Wall Street including UBS, Lehman Brothers, and A.G Edwards. Working as an analyst, in compliance and as a Financial Advisor has given him the full perspective on the operations of a financial firm. Brian received his Bachelor of Science in Finance with an International Business Background at the University of Central Florida and his Masters in Business Administration from the Masagung School at the University of San Francisco. He has also received the Accredited Asset Management Certification from the College for Financial Planning. Brian is currently President of the American Club of Brussels, a Board Member of the Augusta Chiwy Foundation, Sharkey Foundation and the Brussels Tigers (the local American Football team). www.omniwealth.eu & www.dunhillfinancial.be

Lisa Festerling

Lisa is a tax specialist in Deloitte London's US/UK High Net Worth team. Lisa has over 10 years' experience in both US and UK taxation, providing a wide range of personal tax compliance and advisory services. She has worked with individuals from a variety of industries including investment banking, law firms, media and sports, who have UK and US tax considerations. Lisa also spent three years working as an in-house mobility tax specialist at a global management consultancy firm. You can contact Lisa at lifesterling@deloitte.com and visit www.deloitte.co.uk for more information.

Michael Larsen

Born and raised in Los Angeles, Michael resides in London where he heads the UK Chapter of ACA, Inc. He also has overall responsibility at ACA for new business development. Michael has been involved with ACA for more than 15 years, first in Geneva, where he served as an Executive Committee member and since 2005 initially as a UK Country Contact. Michael is a Senior Managing Director at Harbert Management Corporation, a privately-owned, US-based alternative investment firm. Prior to joining HMC in November 2004 he held a variety of senior management roles in Europe and the Middle East first at Citigroup, with positions in New York, Bahrain, London, Zurich and Geneva, and then with a leading Swiss investment firm before returning to the UK in 2005. Michael received a Bachelor of Arts degree in Economics from Boston University, is registered with the UK Financial Conduct Authority and holds his FINRA/NASD Series 7 and 63 licenses. Michael is also a trustee and non-executive Director at Aspire, a leading multi-academy trust in Cornwall where he also chairs the Finance Committee, and is a liveryman with World Traders. He and his wife Corinne have two children and when not doting on their grandson enjoy taking extended breaks in Arizona and in Cornwall.

Daniel Poelman

Daniel is the Community Manager for International Clients in KBC Brussels. He has been in the banking industry for 27 years where he has advised on management and team building, organizational change, corporate banking and insurance needs, and individual and private banking. He has a MBA from Vlerick Business School and a degree from Sint Gertrudiscollege Wetteren in Latin and Mathematics.

Wani Manly

Wani Iris Manly, Esq. is a corporate, intellectual property, securities, and estate planning lawyer in Paris, France. Licensed to practice law in the state of Florida, she is the principal and founder of the law firm W. Manly, P.A., a boutique corporate and securities law firm she started in 2006 based in Miami, Florida. She is also the bestselling author of the book *Get Out of Survival Mode and Live The Life You Really Want*, and the creator of the acclaimed *Clear Your Money Karma and Live The Life You Really Want Ecourse*. As an international speaker, Wani also speaks on personal development issues for women including, but not limited to, finance for women, global women's empowerment, and professional development for women, and women's leadership.

Christelle Colairo

Christelle from Moneycorp will be addressing the floor on the subject of international money transfers. This is a hot topic right now given all the recent political events which have caused significant movements between USD and EUR. Christelle will provide an overview of Moneycorp's services, explaining how their product suite can be tailored to individual needs, saving money against the high street banks.

Marc Quaghebeur

Marc is a tax lawyer with the law firm De Broeck Van Laere & Partners. He holds a law degree from the Katholieke Universiteit Leuven (1984). He obtained a further degree in tax law from the Fiscale Hogeschool (1985). He is a member of the Brussels Bar since 1984. Marc specializes in international tax issues and corporate structuring. In particular Marc he works with holding companies and investment funds, advises in real estate tax issues, the complex relationship between Belgian law and trusts. Marc is a member of the Society of Tax and Estate Planners, he advises clients regularly on the cross border estate planning issues. He summarized his experience in the book "Rest in Peace, A Guide to Wills and Inheritance Tax in Belgium", the 2017 edition will be published in March 2017. Marc has written the Belgian chapters of the International Guide to the Taxation of Trusts (IBFD), European Cross Border Estate Planning (Sweet and Maxwell) and Doing Business in Europe (Thompson Reuters). He is the Belgian correspondent of Tax Notes International and he is a member of the Editorial Board of the EC Tax Journal. You can contact Marc at mq@dvp-law.com or +32 2 423 00 42 and visit www.dvp-law.com for more information.

Carl Mir

Carl is a career accountant with extensive experience within several corporations. He has been involved in US income tax preparation and reporting for several years. Carl has been in operation in Belgium however since 2015 working toward supporting the American expat communities throughout Europe to remain compliant with the IRS for tax preparation reporting. As a tax consultant for US expats, he has provided advice on filing requirements and compliance to the US concerning tax and financial reporting issues. Carl's company, Mir Taxes, provides assistance for Americans to become compliant and current with the IRS and the US Treasury. Carl received his Bachelor of Arts with an emphasis in international relations and business from the University of Southern California. Carl also holds a Master of Business Administration in Accounting and is completing his dissertation toward the doctorate degree of a PhD in Accounting. For additional information on Carl, or Mir Taxes, visit the website at www.mirtaxes.com.

John Stuyck

John has been the Managing Director and Publisher of The Bulletin since 1985 at www.xpats.com.

DID YOU KNOW?
GIVING STOCKS TO CHARITY

You may already be aware that you may benefit from a U.S. tax deduction when providing cash donations to your favorite charity or non-profit. But, did you know that you can also donate stocks?

Gifting stocks to a charity benefits not only the charity, but the donor as well. By transferring the stocks "in kind" to the designated charity, the donor will avoid a U.S. capital gains tax and still be eligible for a U.S. tax deduction. Here in Belgium, many charities are covered through the King Baudouin Foundation as well as others such as CAFAmerica which provide 501c status to international entities outside the U.S., making donors eligible to receive U.S. tax benefits.

Within the American Club of Brussels network, we are always looking for ways to help charity and non-profits in Belgium, such as these organizations below. We encourage you to seek out these organizations and others you may know to support them by volunteering, sharing their news with your network and helping to meet their financial needs through cash or stock donations.

THE AUGUSTA CHIWY FOUNDATION

The Augusta Chiwy Foundation was created to celebrate the strength of the human spirit and encourage selfless service to humanity through the creation and production of documentary films, scholarships, grants, educational materials and lectures.

CHS | COMMUNITY HELP SERVICE
supporting our international community since 1971

CHS has developed a telephone hotline, Mental Health Centre and Educational Testing Services to encompass the many different expatriate communities in Belgium who find it easier to use English rather than one of the official languages of Belgium.

Pathways Institute for Negotiation Education

PATHWAYS works with high school students and teachers to build interest-based negotiation skills and to establish a shared framework for creative problem solving by providing experiential workshops, and ongoing learning in the classroom.

FULBRIGHT BELGIUM LUXEMBOURG
FULBRIGHT COMMISSION
Academic Exchanges between the United States, Belgium and Luxembourg
Education USA

The Fulbright Program, the U.S. Government's international exchange program, is designed to increase mutual understanding between the people of the U.S. and of other countries. Grants are awarded to American and foreign nationals to study, teach, lecture and conduct research abroad.

greenlight for girls
The future is full of possibilities

Greenlight for girls (g4g) is an international non-profit organization headquartered in Brussels. Through hands-on events, activities, workshops and scholarships, they encourage children to pursue STEM studies by demonstrating the fun in science.

American Red Cross

An international humanitarian movement with approximately 97 million volunteers, members and staff worldwide which was founded to protect human life and health, to ensure respect for all human beings, and to prevent and alleviate human suffering.