

Estate Planning Across Jurisdictions

Presented by STEP New York

November 6, 2024

Private Wealth Partner Kathryn von Matthiessen will speak on the "Estate Planning Across Jurisdictions: U.S. Citizens Living in Italy with U.S. and Italian Beneficiaries" panel discussion at 11:45 a.m. on Wednesday, November 6. The seminar, held in Katten's New York office, will discuss the case of a US citizen wishing to pass all of her assets to her daughter, a US citizen living in the United States, and her late-in-life partner, an Italian citizen and resident. It will delve into:

- Drafting of wills;
- Election of applicable laws to the succession under US law and EU Regulation No. 650/2012;
- Creation of trusts and their taxation in Italy and the United States during the testator's life and after her demise;
- Trusts and application of estate/inheritance taxes in both countries; and
- Mismatches in tax systems and key points to consider to avoid double taxations.

[Learn more about the "Estate Planning Across Jurisdictions" event.](#)

CONTACTS

For more information, contact your Katten attorney or any of the following attorneys.



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