

Strafford Webinars

We are pleased to announce that Gidon Broide, partner at Broide & Co. recently participated in a Strafford webinar, "[U.S.-Israeli Estate Tax Planning for Dual Citizens](#)." Due to overwhelming popularity, we scheduled an encore presentation with a live question and answer session for **Tuesday, November 21, 1:00pm-2:30pm EST. That's 8:00pm -9:30pm Israel Time.**

The close social and political ties between the United States and Israel make for significant economic migration for citizens of both countries. Many American citizens avail themselves of the "right of return" (Hok Hashvut) to immigrate to Israel and claim dual citizenship.

Estate planners and advisers serving clients contemplating emigration to Israel must know specific issues and provisions in Israeli and U.S. law governing estate and trust transfers to avoid costly tax consequences.

The differences between U.S. and Israeli estate and wealth transfer rules present several key challenges. Although Israel does not impose an estate tax, a recently-passed Israeli law imposes significant Israeli income tax liabilities and reporting obligations on trusts created by a foreign person with Israeli beneficiaries.

The U.S.-Israel tax treaty allows for reciprocal credits for U.S. estate tax and Israeli taxes, but estate planners must reconcile the differences between the two countries' tax regimes and plan to minimize the tax impact of wealth transfers. This requires a thorough grasp of treaty provisions and recognizing the U.S. and Israeli income and gift tax implications of wealth planning transactions.

Our panel will provide estate planners with a helpful guide to estate planning tax challenges and opportunities for clients who have tax presence in both the United States and Israel. The panel will discuss the U.S. tax law and treaty provisions that govern tax rules in both Israel and the United States. The webinar will focus on Israeli tax treatment of trusts with U.S. persons as settlors and Israeli residents as beneficiaries.

We will review these and other key issues:

- What provisions does the Israeli Law of Inheritance make for spousal or child maintenance and how may it conflict with a testamentary document?
- What is the tax treatment for foreign-settled trusts with Israeli beneficiaries?
- Where are the "gap" areas in the U.S.-Israel tax treaty where income may be subject to dual taxation, and how may planners structure trust vehicles to minimize the dual tax impact?

After our presentations, we will engage in a live question and answer session with participants so we can answer your questions about these important issues directly.

We hope you'll join us.

We have a limited number of complementary registrations available for clients and colleagues of Broide & Co. Please let us know if you're interested: dvora@broide.com

[For more information or to register >](#)

Or call 1-800-926-7926 ext. 10

Ask for U.S.-Israeli Tax and Estate Planning for Dual Citizens on 11/21/2017

Mention code: ZDFCT

Sincerely,

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