

Objective

The new EU Succession Regulation (EU) No 650/2012, which aims to ameliorate and simplify international inheritance rules, is applicable since 17 August 2015. Due to various uncertainties it still provides for new challenges in cross-border estate planning.

After nearly one year of experience with the Regulation, this seminar will discuss key practical problems for cross-border estates on the basis of real cases and case-studies. Active participation of the participants will be encouraged through a workshop format.

Key topics

- First practical experience with the Regulation
- Habitual residence of the deceased: definition and doubts
- Protection of family members, reserved portion and choice of law
- The interplay of succession law with property and matrimonial property law: some intricacies
- Separate *situs* wills and the relation to third states
- European Certificate of Succession: a success story?

Who should attend?

Lawyers in private practice and notaries involved in succession planning, judges, tax lawyers.

Travel to Trier:
Shuttle services from Luxembourg airport to the ERA Conference Centre can be booked at special rates with our partner Finkelgruens Taxi: www.finkelgruens-taxi.de/era

Speakers

Ulf Bergquist, Senior Partner, Bergquist & Partners, Stockholm

Professor Astrid Deixler-Hübner, University of Linz

Richard Frimston, Partner, Head of the Private Client Group, Russell-Cooke, London

Dr Diane Le Grand de Belleruche, *Avocat au Barreau de Paris*, Solicitor of the Senior Courts of England and Wales, Cabinet Tripet, Paris

Professor Jens Kleinschmidt, University of Trier

Richard Rachlitz, Director, Federal Chamber of German Civil Law Notaries, Berlin

Professor Martin Schauer, University of Vienna

Agata Srokowska, Judge, Ministry of Justice of the Republic of Poland, Warsaw

Professor Patrick Wautelet, University of Liège

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Online registration:

www.era.int/?125531&en



WORKSHOP ON THE EU SUCCESSION REGULATION

Case studies and exchange of experience

Trier, 2-3 June 2016
ERA Conference Centre
Metzer Allee 4, Trier, Germany

Conference organiser:
Dr Angelika Fuchs, ERA

Language:
English and German (with simultaneous interpretation)

Event number:
116D98



Thursday, 2 June 2016

- 08:30 Arrival and registration
- 09:00 **Welcome and introduction**
Angelika Fuchs
- Moderator: *Astrid Deixler-Hübner*
- 09:05 **First experiences with the EU Succession Regulation**
Ulf Bergquist
- 09:45 Discussion
- 10:00 **Key challenges when drafting last wills, matrimonial and inheritance agreements**
Diane Le Grand de Belleruche
- 10:40 Discussion
- 11:00 Coffee break
- 11:30 **Workshop No 1:
Succession, donations *inter vivos* and life insurance as part of the estate**
Patrick Wautelet
- 12:30 Discussion of the workshop results
- 13:15 Lunch

- 14:15 **Workshop No 2:
Protection of family members, reserved portion, choice of law and public policy: what can the deceased do to strengthen his/her will?**
Astrid Deixler-Hübner & Martin Schauer
- 15:00 Discussion of the workshop results
- 15:45 Coffee break
- 16:00 **Workshop No 3:
Using multijurisdictional and separate *situs* wills when owning assets in and outside the EU**
Richard Frimston
- 17:00 Discussion of the workshop results
- 17:45 End of the first seminar day
- 19:00 Evening programme
- 20:00 Dinner

Programme may be subject to amendment.
For programme updates: www.era.int

Friday, 3 June 2016

- 09:00 **Workshop No 4:
Validity of marriage, matrimonial property law and the European Certificate of Succession (ECS)**
Jens Kleinschmidt
- 10:00 Discussion of the workshop results
- 10:45 Coffee break
- Moderator: *Diane Le Grand de Belleruche*
- 11:15 **ECS and national certificates: interplay and divergence**
Agata Srokowska
- 11:45 Discussion
- 12:00 **Practical issues regarding the ECS with a focus on the cross-border effects of the Certificate**
- *Richard Rachlitz*
 - *Ulf Bergquist*
 - *Agata Srokowska*
- 12:30 Discussion
- 13:00 **Concluding remarks and open issues**
Richard Frimston
- 13:10 Lunch and end of the seminar