



**100 women in
hedge funds®**

**Education Session No. 618:
Tax Strategies and Risk Management Techniques for Family Offices and Individual Wealth Planning**

March 22, 2016 at 6 PM
San Francisco, CA

Vision, tax structure, risk management and plan. These are the building blocks for successful wealth planning and management -- for a family office and for individuals. When considering estate planning vehicles, it is crucial to situate wealth generation and wealth preservation in the context of domestic and global macro economic uncertainty. In an integrative discussion, you will learn the components of a holistic plan, integrating tax efficient cross-border investment strategies and risk management programs for successful private wealth planning. Bring your questions and possible scenarios, for your clients and for your portfolio. Space is limited.

Participants

Margo Doyle, S-Cubed Capital
Lucy S. Lee, Akin Gump
Judith M. Moses, CFA, Evercore
Benjamin Sloan, Bessemer Trust
Natasha G. Kohne, Moderator, Akin Gump

Event Details

Date: March 22, 2016

Time: 5 PM Registration.

We will begin *promptly* at 6 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Host: Akin Gump Strauss Hauer & Feld LLP

Location: Villa Taverna

27 Hotaling Place (bt. Washington St. and Jackson St.), **San Francisco**, CA 94111 - [Directions](#)

RSVP: [RSVP Now](#)

If you have any questions about this event, please contact the [California, North](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission is free, but there is a \$25 charge if you register and do not attend, even if you cancel in advance. No-show proceeds will be donated to the beneficiary of 100WHF's most recent US philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted.

Biographies

Margo Doyle, Chief Investment Officer, S-Cubed Capital

Margo is the Chief Investment Officer for S-Cubed Capital, a single-family office in Menlo Park, CA. Margo oversees the S-Cubed portfolio including public and private assets, real estate and an active direct investment program. She also currently leads the internal operations of the family office and assists in developing the family's significant philanthropic program.

At S-Cubed, Margo leverages her twenty-year career touching all aspects of early and growth stage companies as an investment banker, venture and growth equity investor, investment committee member and investment consultant. Most recently, Margo was a Managing Director with Cambridge Associates, a leading global investment consulting firm where she spent over a decade advising pensions, foundations, universities, and families on investments across a variety of private asset classes. Margo also served as an outsourced director of alternative investments for a selected group of clients. Prior to Cambridge Associates, Margo was a direct investor and private placement advisor for venture and growth companies at TA Associates, Kodiak Venture Partners and Alex. Brown & Sons. She holds a BS from Georgetown University and a MBA from Harvard Business School. A Midwest native, and long-time New England resident, Margo now lives in Northern California where she spends her weekends playing with her three children and, if lucky, getting in a game of tennis.

Lucy S. Lee, Partner, Akin Gump

Lucy S. Lee focuses her practice on U.S. cross-border tax planning for individuals (including athletes and entertainers), closely held companies, private equities and hedge funds, family offices, private foundations, and trusts and estates.

Ms. Lee advises clients in structuring and managing their funds, businesses and investments in bilateral or multilateral jurisdictions, including IPOs of closely held businesses. She works with businesses in improving financial efficiency through proactive planning and management of tax attributes (including managing anti-deferral regimes, foreign tax credits, taxable nexus, and bilateral tax treaties), and develops risk management programs to avoid unrecoverable tax costs. She advises on pre-immigration planning of high net worth individuals and executives and represents U.S. individuals in expatriations. She advises individuals and families with U.S. nexus in their succession planning, including use of domestic and foreign trusts. Ms. Lee also provides U.S. tax and compliance advice to foreign trusts and estates, and works with private foundations in developing tax efficient cross-border investment strategies and risk management programs.

Ms. Lee advises on U.S. tax compliance in the cross-border context, including issues related to residency-based reporting, short-term business travelers, FATCA compliance, and disclosures of interests in offshore assets and financial accounts. She represents taxpayers in controversies with the Internal Revenue Service and with foreign tax authorities under Mutual Agreement Procedures. She also helps U.S. taxpayers in curing their prior noncompliance, including representing them in voluntary disclosures.

Prior to joining the firm, Ms. Lee was a partner at Ernst & Young LLP, where she led the firm's cross-border private client services group in its national tax department and served as the firm's liaison to international tax services. Prior to Ernst & Young, Ms. Lee served as international corporate tax counsel for General Electric Company, where she supported the company's capital and industrial businesses and investments in Asia, Europe and Latin America. She was also a tax partner in a boutique law firm where she developed and managed that firm's Asia practice.

Ms. Lee speaks and writes frequently on U.S. tax issues of individuals, companies and foreign trusts, including lecturing to foreign tax authorities and at conferences sponsored by various organizations including the American Bar Association, the American Law Institute, Certified Public Accountant associations, International Association of Korean Lawyers, and the National Tax Service of Korea. She has published numerous articles including in Tax Notes and publications sponsored by the ABA, ALI AND CCH. She has been recognized as a 'Leading Lawyer' in tax by Legal 500 and the Corporate Tax Directors Handbook, and has been recognized by the National Tax Service of Korea for "Outstanding Contribution to the Deepening of Cooperation between the Korea and USA Tax Administrations." Ms. Lee has also been appointed by the president of Korea to serve her second two-year term as a member of the National Unification Advisory Council of Korea, an advisory body to the president on the reunification of the Korean peninsula.

Ms. Lee is fluent in Korean. She received her LL.M. (Taxation) from the Georgetown University Law Center and her J.D. from the George Washington University Law School.

Judith M. Moses, CFA, Partner & Portfolio Manager, Evercore

Judith Moses is a Partner and Portfolio Manager at the San Francisco office of Evercore Wealth Management, which manages \$6.1 billion for individuals and families across the United States. She works directly with clients, designing and managing customized investment portfolios. Judith is also a member of the firm's Asset Allocation Committee and Manager Selection Committee, which is responsible for the selection, due diligence and on-going monitoring of all third-party investment managers.

Judith has over 20 years of experience in the financial services industry. Prior to joining Evercore Wealth Management, she was a Vice President at U.S. Trust in San Francisco, and a Senior Portfolio Manager at Charter Financial Group, Inc. in Washington, D.C.

Judith received her B.A. in Economics from the University of California, Berkeley and M.B.A. from Georgetown University's McDonough School of Business. She holds the Chartered Financial Analyst designation and is a member of the CFA Institute and the CFA Society of San Francisco. Judith also serves on the Board of Trustees of Santa Catalina School.

Benjamin Sloan, Principal and Senior Wealth Advisor, Bessemer Trust

Mr. Sloan is a principal and senior wealth advisor for Bessemer Trust, responsible for business development and client relationships in Northern California, Nevada, Oregon and Washington. He works with a team of client advisors and wealth management specialists to deliver comprehensive investment and wealth management services.

Prior to joining Bessemer in 2005, he worked in the securities litigation practice group of Wilmer Cutler Pickering Hale and Dorr LLP.

Mr. Sloan is a Trustee of the T. Rodney Crowley Scholarship at the University of Virginia, and is a founding member of the Royal Aberdeen Society, which hosts an annual charity golf tournament benefiting the Virginia Athletic Foundation.

Mr. Sloan earned a B.A. from The University of Virginia, and an M.B.A. from the University of California at Berkeley's Haas School of Business.

Natasha G. Kohne, Partner, Akin Gump

Natasha G. Kohne is co-leader of Akin Gump's cybersecurity, privacy and data protection practice and Middle East practice, in which capacity she spends significant amounts of time assisting clients in the U.S., the Middle East and other international markets. She is also spearheading Akin Gump's international efforts in relation to data protection and cybersecurity.

Ms. Kohne's practice focuses on cybersecurity related topics, including risk assessments and the mitigation and management of cyber intrusions and related privacy and security incident response preparation. She advises on data breach investigations and enforcement, Securities and Exchange Commission (SEC) cybersecurity compliance, legislative and regulatory requirements and processes, privacy and data protection compliance, as well as related litigation. Ms. Kohne is heavily involved in U.S., international and cross-border litigation, arbitration and investigations across various industries including technology, financial services, health care, energy and infrastructure. More generally, she is regularly engaged in disputes, risk management, compliance and corporate advisory work on behalf of public entities, multinational clients, high net worth individuals/family offices and private companies.

Ms. Kohne routinely serves as an international arbitrator and has extensive experience over the years in government and regulatory investigations and in complex commercial disputes before an array of courts and international tribunals in various countries in the Middle East, Europe and North America.

Furthermore, Ms. Kohne has led several reform projects for governments, including in emerging areas such as cybersecurity, privacy and data protection, asset recovery, judicial procedure and construction. She has experience in both civil law and common law jurisdictions.

Ms. Kohne is a Certified Privacy Professional (CIPP/US) with the International Association of Privacy Professionals.

Akin Gump

STRAUSS HAUER & FELD LLP

About Akin Gump Strauss Hauer & Feld LLP

Akin Gump Strauss Hauer & Feld LLP is a leading global law firm providing innovative legal services and business solutions to individuals and institutions. Founded in 1945, with the guiding vision that commitment, excellence and integrity would drive its success, the firm focuses on building lasting and mutually beneficial relationships with its clients. We incorporated those qualities into the firm's core values as we grew into an international full-service firm positioned at the intersection of commerce, policy and the law. Today, Akin Gump is one of the world's largest law firms, with more than 900 lawyers in 21 offices.

Akin Gump lawyers offer clients efficient service, strategic planning and key counseling. We are dedicated to teaming with clients as innovative business and legal advisors, always with an eye toward the short and long-term objectives of their business. Our goal in every engagement is to offer a level of client service that not only meets but anticipates our clients' needs and exceeds their expectations. From reputational defense of headline-makers to down- and midstream energy investments, from precedential class action dismissals to protection of terrorism's victims, we serve clients in over 85 practices that range from the traditional, such as corporate, tax and litigation, to the contemporary, such as climate change and national security. Our lawyers' in-depth knowledge of various industries and familiarity with the relevant players enable them to provide strategic legal and business advice on a wide range of issues.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)

100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 500 industry education events globally, connected more than 350 senior women through Peer Advisory Groups and raised over \$38 million for philanthropic causes in the areas of women's and family health, education and mentoring.