Edward Vergara

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Partner

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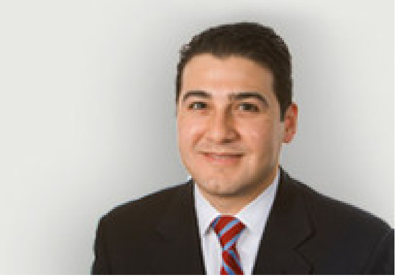
Education: New College of Florida, B.A. • Georgetown University Law Center, J.D. • New York University School of Law, LL.M.

Admitted: State of NY, 2002 • State of CT, 2008 • Registered Foreign Lawyer in the UK, 2010 • State of CA, 2014

Languages spoken: Spanish

Year joined: 2008

Year became partner: 2010



Overview

Ed advises U.S. and multi-national individuals making domestic and international investment and succession planning decisions. Ed has extensive experience advising on U.S. inbound and outbound investments, individuals migrating into or out of the United States, U.S. beneficiaries of foreign trusts and foundations, and fiduciaries managing foreign structures for the benefit of U.S. persons. Ed also works with the principals of hedge funds and private equity funds on a variety of matters, including estate planning and advising on fund structures that satisfy investor demands while advancing important tax and estate planning goals of the principals.

Ed is admitted to the United States Court of Federal Claims.

Publications and speaking engagements

- Speaker, "Riesgos fiscales y legales en inversiones immobilarias en EE.UU. y Soluciones Practicas," International Wealth Planners, Lima, Peru, September 2014.
- Host, Inside the Entrepreneurial Mind Monthly Breakfast Series, Greenwich, CT.
- Presentation, "Foreign Trust Challenges for U.S. Tax Advisors: Navigating Fiduciary Accounting Income, Form 3520, FATCA," Strafford Publications Webinar, August 2014.
- Presentation, "International Tax Issues for the Domestic Estate Planner," BNA Webinar, August 2013.
- Presentation, "Foreign Trust Challenges for U.S. Tax Professionals," Strafford Publications Webinar, July 2013 .
- Speaker, "Tax Planning," Northeast Landmark Venture Forum, March 2013.
- Moderator, "Tax Update Panel," Landmark Venture Forum, December 2012.
- Co-author of "The Advantages of Pooling Angel Investments," Family Wealth Report, December 2011.
- Presentation, "Pre-Immigration Tax Planning," HLB Estate and Trust Tax Services Group, September 2011.
- Presentation, "Gifting Fund Management Fees and Carried Interest Incentives," Stout Risius Ross Presentation, May 2011.
- "Preferred Partnership Freezes," *Trusts and Estates Magazine*, May 2011.
- "Death in the Soy Field Down Under: Inheritance and Gift Tax in Argentina's Buenos Aires Province," *The Journal of Wealth Management*, Summer 2011.
- Presentation, "Basics of International Taxation," ABA International Law Section 2010 Spring Meeting, April 2010.
- "The FLP Quadrilogy," *Trusts and Estates Magazine*, December 2009.
- "Special Report: The International Practice - Gift Tax Cost Depends On Form *And* Substance," *Trusts and Estates Magazine*, November 2009.
- Presentations, "Tax and Estate Planning Updates," at Connecticut CPE Seminars, Norwalk and Hamden, CT, June 2009.
- "Taking Stock (of Your Stock)-The Importance of Business Succession Planning." Exit Planning Newsletter, June 2009.
- Presentation, "Basics of International Taxation," New York State Bar Association First Annual Fundamentals of International Practice, April 2009.
- "Managing Risk," Wealth Manager Magazine, January 2009.

Memberships

- New York State Bar Association
- Estate Planning Council of Lower Fairfield County

On a personal note

Ed enjoys listening to jazz and playing tennis.