

West Coast Forum 2025



November 11 – San Francisco | November 12 – Los Angeles

Time	Topic/Activity
11:30 – 11:55 am	Lunch & registration
11:55 – 12:00 pm	Welcome
12:00 – 1:00 pm	<p>Presidential potency: Navigating wealth, work, and immigration policies</p> <p>This fast-paced session explores key developments in employment, immigration, and tax policy, along with broader impacts of the new administration's legislative agenda. We will discuss tax planning updates, prevailing political activity, and forecasts shaping federal policies, as well as the effects of immigration changes and enforcement priorities on access to global talent essential to high-net-worth families and their businesses.</p> <p>Speakers Laurie A. Baddon Partner McDermott Will & Schulte Joan-Elisse Carpentier Partner McDermott Will & Schulte Elizabeth R. Glasgow Partner McDermott Will & Schulte, <i>Moderator</i> David G. Noren Partner McDermott Will & Schulte</p>
1:00 – 1:15 pm	Break
1:15 – 2:15 pm	<p>Mobility and migration: Second passports, offshore accounts, and expatriation</p> <p>This session delves into the international mobility of individuals and assets, from acquiring second passports and foreign residency to navigating the legal and tax implications of offshore accounts, trusts, and real estate. We will also consider the practical realities of expatriation, equipping you to act decisively in a fast-changing global environment.</p> <p>Speakers Chris Nason Partner McDermott Will & Schulte Arianne R. Plasencia Partner McDermott Will & Schulte</p>

Time	Activity/topic
2:15 – 3:15 pm	From outsourced to in-house: Building the right team at the right time <p>As family offices evolve, so do their needs for talent, oversight, and operational flexibility. This session examines the strategic spectrum between outsourcing and insourcing key functions – such as finance, legal, investment, operations, and lifestyle services – and how to find the right mix at different stages of growth. We will explore decision-making frameworks, real-world case studies, and the key inflection points that signal when it's time to bring more capabilities in-house. Attendees will leave with actionable insights to help principals and executives align staffing models with their long-term vision and values.</p> Speakers Sree Arimilli President Arimilli Consulting, Inc. Audrey Scott Partner McDermott Will & Schulte
3:15 – 3:30 pm	Break
3:30 – 4:30 pm	IRS disputes: Personnel, procedures, and priorities <p>With shifts in IRS personnel and policy reshaping the enforcement landscape, this session will help you stay ahead of the curve. We will unpack today's most pressing audit issues, explore best practices for managing contests and appeals, address related reporting and procedural considerations, and review updates to processes for requesting relief or rulings – equipping you to respond decisively and strategically.</p> Speakers Parisa M. Griess Counsel McDermott Will & Schulte Julie Miraglia Kwon Partner McDermott Will & Schulte
4:30 – 5:30 pm	Closing Remarks & Reception