

Objective

The objective of this conference is to provide a forum for discussion of the most topical issues regarding successions and wills in a European context.

Key topics

- In-depth analysis of Regulation (EU) No 650/2012 of 4 July 2012 on cross-border successions, with a focus on
 - Scope of application
 - Jurisdiction and applicable law
 - Recognition and enforcement
 - Authentic instruments
 - European Certificate of Succession
- National succession laws in Europe
- Cross-border successions and third states

Who should attend?

Lawyers in private practice and notaries involved in succession planning, ministry officials and academics.

Travel to Trier:

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

Speakers

Professor Andrea Bonomi, University of Lausanne

Dr Eleanor Cashin Ritaine, Attorney at law, LALIVE, Geneva; University of Lorraine

Dr Christoph Dorsel, Notary, Brühl

Dr Anatol Dutta, Senior Research Fellow, Max Planck Institute for Comparative and International Private Law, Hamburg

Professor Sjef van Erp, University of Maastricht

Mr Richard Frimston, Solicitor and Notary Public, Head of Private Client, Russell-Cooke, London

Professor Michael Hellner, University of Stockholm

Mr Kurt Lechner, Notary, former Member of the European Parliament, Brussels / Strasbourg

Dr Daniel Lehmann, Partner, RölfsPartner, Munich

Mr Hugues Letellier, Partner, HOHL Avocats, Paris

Dr Martin Margonski, Trainee Notary, Wrocław / Ślubice

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CROSS-BORDER SUCCESSIONS WITHIN THE EU

THE NEW EU REGULATION
NO 650/2012 OF 4 JULY 2012

Trier, 22-23 November 2012
ERA Conference Centre
Metzer Allee 4, Trier, Germany

Conference organiser:
Dr Angelika Fuchs

Languages:
English and German
(simultaneous interpretation)

Event number: 112D38



Education and Culture DG
Lifelong Learning Programme

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Thursday, 22 November 2012

08:45 Arrival and registration

09:10 Welcome
Angelika Fuchs

Chair: *Richard Frimston*

I. SETTING THE SCENE

09:15 **National succession laws in comparative perspective**
Eleanor Cashin Ritaine

10:00 Discussion

II. LEGAL ISSUES BEFORE THE ACCRUAL OF THE INHERITANCE

10:15 **Scope of the EU Succession Regulation**
Interpretation and preliminary questions, interplay of succession law and other rules, including matrimonial property regimes, gifts, trusts and testamentary trusts
Michael Hellner

11:00 Discussion

11:15 Coffee break

11:45 **Choosing the applicable law**
Party autonomy, formal requirements and scope of applicable law
Andrea Bonomi

12:30 Discussion

13:00 Lunch

Chair: *Sjef van Erp*

14:00 **Jurisdiction in the event of a choice of law, choice-of-court agreements and jurisdiction based on other grounds**
Hugues Letellier

14:40 Discussion

15:00 Coffee break

15:15 **WORKSHOP:**
Succession planning in cross-border cases
Drafting dispositions upon death and agreements as to succession
Daniel Lehmann

16:15 **Results of the workshop and discussion**

17:30 End of the first conference day

19:00 Evening programme and dinner

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

Friday, 23 November 2012

Chair: *Andrea Bonomi*

III. LEGAL ISSUES AFTER THE ACCRUAL OF THE INHERITANCE

09:15 **How to determine the deceased's habitual residence at the time of death?**
Sjef van Erp

09:40 **Effects of foreign decisions and authentic instruments in matters of succession: recognition, enforcement and acceptance**
Anatol Dutta

10:00 **Securing the estate in cross-border cases**
Martin Margonski

10:20 Discussion

10:45 Coffee break

Chair: *Kurt Lechner*

11:15 **European Certificate of Succession**
Conditions for issue of certificate, effects and *lex rei sitae*
Christoph Dorsel

12:00 Discussion

IV. INTERNATIONAL SETTING

12:15 **The EU Regulation on succession and the relationship to third countries**
Richard Frimston

13:00 Discussion

13:15 Lunch and end of the conference