

Partner

**Offices:** Geneva

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**Education:** Harvard University, University of Alabama, B.S. Accounting • Washington and Lee School of Law, Juris Doctorate • New York University School of Law, Masters of Laws of Taxation

**Admitted:** State of OH, 1988 • State of GA, 1992

**Year joined:** 2005

**Year became partner:** 2005



## Overview

David heads the US tax practice in Geneva and gives advice on international tax, succession and charitable planning for families with members or financial interests in multiple jurisdictions with particular emphasis on US inbound/outbound investment structuring and US pre-immigration and expatriation planning.

David is a regular advisor to financial institutions/other intermediaries on 'best practice' policies and procedures intended to minimise risks and capitalise on opportunities in dealing with US persons or families with US persons. He has also been heavily involved in advising clients on the [IRS Voluntary Disclosure](#) programmes.

## Publications and speaking engagements

David is a frequent lecturer on US tax and succession planning topics.

## Memberships

Society of Trust and Estate Practitioners (STEP)

