



61st Annual Hawaii Tax Institute  
China-U.S. Alliance Program



# 第61届夏威夷年度税务研讨会 中美联盟项目

— sponsored by —

Hawaii Tax Institute Foundation & Chaminade University of Honolulu

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夏威夷税务研究基金会与檀香山夏明纳德大学

NOVEMBER 3 – 6, 2024

2024年11月3日—11月6日



Sheraton Waikiki Resort

2255 Kalakaua Avenue, Honolulu, Hawaii 96815

喜来登威基基度假村

卡拉卡瓦大道2255号·檀香山·夏威夷 96815

第61届夏威夷年度税务研讨会  
中美联盟项目  
2024年11月3日—6日

61 ST ANNUAL HAWAII TAX INSTITUTE  
CHINA-U.S. ALLIANCE PROGRAM  
NOVEMBER 3 – 6, 2024

## WELCOME

The Hawaii Tax Institute Foundation and Chaminade University of Honolulu warmly invite all professionals from China interested in learning about how wealth transfer works in the United States and to participate in the China-U.S. Alliance Program.

This year's program will combine a far-reaching experience from its distinguished faculty with a positive and practical approach to learning.

While the Institute is designed primarily to serve as a forum where tax and wealth transfer-oriented people may freely exchange ideas on practical problems, professional status is not a prerequisite for registration. This program is designed for attorneys, accountants, financial planners, bank and trust administrators, insurance agents, non-profit administrators, enrolled agents and others who would benefit from high quality continuing education and experience. A high level of learning has been the hallmark of prior Institutes and we shall endeavor to again maintain this standard.

For program descriptions or more information, please visit our website at [www.hitaxinstitute.org](http://www.hitaxinstitute.org).

## 欢迎

夏威夷税务研究基金会和檀香山夏明纳德大学诚挚邀请所有对美国财富传承如何运作感兴趣的中国专业人士参加本中国—美国联盟项目。

今年的项目将基于优秀教职人员的丰富经验，以积极、务实的方式开展学习。

本研讨会旨在为税收和财富传承领域的人士提供一个就实务问题自由交流的平台，但报名本项目并不需要相应的专业身份。本项目适合律师、会计师、财务规划师、银行和信托管理人、保险代理人、非营利组织管理员、注册代理人及其他希望得到高质量继续教育的人士参与。高水平的学习一直是此前本研讨会的标志，我们将继续努力，保持这一标准。

如需了解项目详情或更多信息，请访问我们的网站：[www.hitaxinstitute.org](http://www.hitaxinstitute.org)。

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CHINA-U.S. ALLIANCE PROGRAM  
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## 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

周日·11月3日

SUNDAY, November 3

- 上午11:00 – 下午2:00** 签到，夏威夷喜来登威基基酒店大堂  
Early Registration in main foyer, Sheraton Waikiki
- 下午2:00 – 3:00** 欢迎酒会，了解彼此：社交联谊和非正式介绍（总统套房2936室）  
Welcome Reception, Getting to Know Each Other: Social Mixer and Informal Introductions (Presidential Suite Room 2936, Sheraton Waikiki)
- 下午3:00 – 3:15** 美国夏威夷税务研讨会 (HTI) 的欢迎致辞，介绍顾问委员会成员、HTI的愿景、继续教育课程、从美国视角开展的项目设计及HTI的交流平台  
Welcome from US HTI, Introduction to Advisory Board Members, Vision of HTI, CE Credits, Design of Program Experience from US Perspective and interface with US HTI
- 下午3:15 – 3:30** 介绍酒店设施、会议室、VIP贵宾套房、茶歇、早餐、午宴和晚间社交活动  
Orientation to Hotel Facilities, Session Rooms, VIP Prestige Suite, Breaks, Breakfasts, Luncheons, and Evening Social Events
- 下午3:30 – 5:15** 对中美联盟项目、议题、高级官员、演讲者、赞助商、筹委会成员、注册成员和美国HTI项目进行介绍，包括亮点及交叉项目，如有时间则进行正式介绍  
Orientation to China-U.S. Alliance program, topics, high ranking officials, speakers, sponsors, planning committee members, registrant profile booklet and US HTI programs, highlights and crossover programs, formal introductions, if time permits.
- 下午5:30 – 8:30** Mai Tai鸡尾酒晚间社交活动，夏威夷皇家酒店  
Mai Tai Bar Kickoff Evening Social Event, Royal Hawaiian

周一·11月4日

MONDAY, November 4

- 上午7:00 – 8:00** 欧陆式早餐，夏威夷喜来登威基基酒店  
Continental Breakfast, Sheraton Waikiki
- 上午8:00 – 8:15** 开幕式和欢迎辞（在夏威夷皇家酒店摄政厅进行现场直播）  
Opening Ceremony and Welcome (Livestream Regency Room, Royal Hawaiian)
- 上午8:15 – 9:30** 会程1：美国信托及遗产规划和税务申报基础  
**Session 1: Fundamentals of U.S. Trusts and Estates Planning and Tax Reporting**  
简介：本场将讨论为在美国拥有资产的中国公民开展生前和死后的财富转移所涉及的基本税收制度。  
Description: This session will discuss the fundamentals of the wealth transfer tax system during life and at death for Chinese Nationals with assets in the U.S.  
**演讲者：Speakers:**  
**王文莉·注册会计师** Wenli Wang, CPA  
**胡鹏·律师** Eric Hu, Attorney  
**王佳华·律师** Jiahua Wang, Attorney

## 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

- 上午9:30 – 9:45** 问答环节  
Questions and Answers
- 上午9:45 – 10:00** 茶歇, 夏威夷皇家酒店  
Break, Royal Hawaiian
- 上午10:00 – 11:15** 会程2: 跨境继承  
**Session 2: Cross Border Inheritance**  
简介: 本场将讨论如何协助 (1) 美国居民处理在中国的财产继承和 (2) 中国居民完成在美国的遗嘱认证程序。演讲者将比较遗嘱认证法院/公证处的作用, 财产持有有限制, 不同的税务影响, 以及外汇管制如何影响财富转移。最后, 演讲者将为美国居民在中国的财产和中国居民在美国的财产进行遗产规划提供建议, 避免这些可预见的麻烦。  
Description: This session will discuss how to assist (1) U.S. residents to go through the inheritances of assets located in China and (2) China residents to complete the probate process in the U.S. The speakers will share the comparison of the role of probate court/notary public offices, property holding restrictions, different tax implications, and how foreign exchange control can affect the transfer of wealth. At last, the speakers will give advice on how to make estate planning for U.S. resident's China assets and vice versa to avoid these predictable troubles.  
**演讲者: Speakers:**  
**任文霞, 律师** Jane Ren, Attorney  
**傅晶晶, 律师** Jennifer Fu, Attorney
- 上午11:15 – 11:30** 问答环节  
Questions and Answers
- 上午11:30 – 11:45** 茶歇  
Break
- 上午11:45 – 下午1:15** 午餐 Luncheon  
总统套房2936室 Presidential Suite Room 2936, Sheraton Waikiki  
午餐议程1: 让您的孩子进入顶尖预备学校和大学  
**Luncheon Session 1: Getting Your Children into Top Prep Schools and Colleges**  
简介: 了解如何让孩子进入美国顶尖预备学校和大学。明白要从出生后尽早开始规划, 在生活的早期阶段制定好计划, 能力须在特定年龄得到检验, 技能培养作为这个过程的一环也要到位。  
Description: Learn about the business of getting children into top prep schools and colleges in the U.S. Understand that the planning begins soon after birth and that a plan needs to be put in place early in life, aptitude needs to be tested at certain ages, and skills training needs to be implemented as part of this process.  
**演讲者: Speakers:**  
来自夏威夷普纳荷私立学校的代表  
Representative from Punahou  
Kitty Wu, **创始人** Kitty Wu, Founder  
Eddy Wu, **项目总监** Eddy Wu, Program Director

## 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

下午1:15 – 1:25	茶歇 Break
下午1:30 – 2:30	<b>会程3：让我们谈谈死亡</b> <b>Session 3: Let's Talk About Death</b> 简介：本场将教授专业人士如何与客户谈论死亡，尽管在亚洲文化下这个话题是禁忌。讨论的话题包括：制定遗产计划的必要性和税务影响、与家人讨论死亡和遗产规划、如何减少死后诉讼以及如何通过照管权/监护权/医疗护理指令等制度处理行为能力衰退的问题。 Description: This program will teach professionals how to discuss death with their clients, although this topic is considered taboo in Asian cultures. The program will cover topics such as the need to have estate plans in place and tax implications, discussions with family about death and estate plans, how to reduce post-death litigation, and how to handle declining capacity via conservatorships/guardianships/health care directives. <b>演讲者：Speakers:</b> <b>劉梓媛，律师</b> Stacie Chau, Attorney <b>尤信砚，律师及注册会计师</b> Tony Yu, Attorney & CPA <b>万利，律师</b> Wan Li, Attorney
下午2:30 – 2:35	提交书面问题 Submission of Written Questions
下午2:35 – 3:20	介绍并与高级官员1对话 Introduction and Discussion with High Ranking Official 1
下午3:30 – 4:00	茶歇 – Aloha冰淇淋社交活动，夏威夷喜来登威基基酒店 Break – Aloha Ice cream Social, Sheraton Waikiki
下午4:15 – 5:15	小组讨论 – 故事交流 Group Discussion – Talk Story
下午5:30 – 7:30	HTI晚间社交活动，夏威夷皇家酒店椰子林 HTI Evening Social Event, Coconut Grove, Royal Hawaiian
结束后 – After Hours	总统套房2936室 Presidential Suite Room 2936, Sheraton Waikiki

周二·11月5日  
TUESDAY, November 5



## 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

- 上午7:00 – 8:00** 欧陆式早餐, 夏威夷喜来登威基基酒店  
Continental Breakfast, Sheraton Waikiki
- 上午8:00 – 9:15** 会程4: 家族办公室的运作机制  
**Session 4: The Dynamics of a Family Office**  
简介: 本场将讨论什么是家族办公室, 大家一般如何看待家族办公室, 家族办公室的主要功能为何, 何时适合使用家族办公室, 以及家族办公室的传承、使命和长远目标。  
Description: This session will discuss what is a family office, how a family office is viewed generally and more specifically, key functions of a family office, when a family office is appropriate, and the legacy, mission, and long-term goals of a family office.  
**演讲者: Speakers:**  
**唐元飞, 律师** Ken Tang, Attorney  
**卢凯谊, 首席财富策略师** Alvina Lo, Chief Wealth Strategist  
**Nelson Wang, 总经理** Nelson Wang, Managing Director
- 上午9:15 – 9:30** 问答环节  
Questions and Answers
- 上午9:30 – 9:45** 茶歇, 夏威夷皇家酒店  
Break, Royal Hawaiian
- 上午9:45 – 11:15** 会程5: 中概公民家庭跨境财富转移规划  
**Session 5: Cross Border Wealth Transfer Planning for the Chinese National Family**  
简介: 本场将讨论在美、中概和世界其他地方拥有资产的中概公民家庭开展规划的精细与复杂, 了解不同的规划策略及各司法管辖地对财富转移的不同征税政策。  
Description: This session will discuss the intricacies of planning for Chinese National Families who have assets in the U.S., in China, and elsewhere in the world. Learn about the different planning strategies used and understand the differences of how each jurisdiction taxes the transfer of wealth.  
**演讲者: Speakers:**  
**Peter Ni, 律师** Peter Ni, Attorney  
**周舒诞, 律师** Shudan Zhou, Attorney
- 上午11:15 – 11:30** 问答环节  
Questions and Answers
- 上午11:30 – 11:45** 茶歇  
Break
- 上午11:45 – 下午1:15** 午宴 Luncheon  
总统套房2936室 Presidential Suite Room 2936, Sheraton Waikiki  
午宴议程2: 保护您的美国房地产资产  
**Luncheon Session 2: Protecting your U.S. Real Estate Assets**  
简介: 本场将讨论中国公民购买美国房地产所使用的各种规划结构, 了解您的客户是否应以个人名义、有限责任公司(LLC)、公司(C或S公司)或有限合伙的形式购买美国房地产, 了解这些不同选择之间的差异以向您的客户提供建议。

## 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

Description: This session will discuss the various planning structures used by Chinese Nationals to purchase real estate in the U.S. Learn about whether your client should purchase U.S. real property in their individual names, limited liability company (LLC), corporate (C or S corporation), or limited partnership. Understand the differences to properly advise your clients.

**演讲者: Speakers:**

**黄志豪, 律师** Raymond Wong, Attorney

**兰娜, 律师** Na Lan, Attorney

下午1:15 – 1:30

茶歇

Break

下午1:30 – 2:30

会程6: 如何起草合同以便您的外国判决得到执行

**Session 6: How to Draft Contracts to Enforce your Foreign Judgements**

本场将讨论外国债权人如何在美国申请仲裁裁决或判决的执行——包括此类执行程序的有效性和潜在陷阱。演讲者们还将讨论起草跨境协议的争议解决条款时应该注意的问题, 以及防范外国债权人进行追索的规划结构的搭建。

Description: This session will discuss how a foreign creditor can domesticate an arbitral award or judgement in the United States – the effectiveness and potential pitfalls of such enforcement actions. The panel will also discuss drafting considerations in dispute resolution provisions in cross border agreements and planning structures used to protect against foreign creditor collection efforts.

**演讲者: Speakers:**

**徐立人, 律师** James Hsu, Attorney

**万利, 律师** Wan Li, Attorney

下午2:30 – 2:35

提交书面问题

Submission of Written Questions

下午2:35 – 3:20

介绍并与高级官员2对话

Introduction and Discussion with High Ranking Official 2

下午3:30 – 4:00

茶歇 – Ohana茶点和饼干, 夏威夷喜来登威基基酒店

Break – Ohana Tea and Cookies, Sheraton Waikiki

下午4:15 – 5:15

小组讨论 – 故事交流

Group Discussion – Talk Story

下午5:30 – 7:30

HTI晚间社交活动, 夏威夷皇家酒店海滩草坪

HTI Evening Networking Event, Ocean Lawn, Royal Hawaiian

结束后 – After Hours

总统套房2936室

Presidential Suite Room 2936, Sheraton Waikiki

周三, 11月6日

# 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

WEDNESDAY, November 6

- 上午7:00 – 8:00** 欧陆式早餐, 夏威夷喜来登威基基酒店  
Continental Breakfast, Sheraton Waikiki
- 上午8:00 – 9:15** 会程7: 外国账户申报: 外国银行账户申报 (FBAR)、美国海外账户税收合规法 (FATCA) 和其他披露表格  
**Session 7: Foreign Account Reporting: FBAR, FATCA and Other Disclosure Forms**  
简介: 了解美国对境外资产的税务申报要求。每位财富转移顾问都应注意, 对于美国居民、绿卡持有人或美国公民, 美国国税局均要求其披露美国境外资产。不披露或忽略外国银行账户申报 (FBAR)、美国海外账户税收合规法 (FATCA) 或其他披露表格要求, 纳税人可能会面临巨额罚款  
Description: Learn about the U.S. tax reporting requirements for assets located outside the United States. Every wealth transfer advisor should be aware that the IRS requires disclosure of assets outside the U.S. if you are a U.S. resident, green card holder, or U.S. citizen. Non-disclosure or ignorance of the FBAR, FATCA, or other disclosure form requirements can result in substantial penalties against the taxpayer.  
**演讲者: Speakers:**  
**李朱迪, 税务经理 Judy Chock, Tax Manager**  
**张雪雪, 会计师/律师 Nelly Zhang, JD/MSA**
- 上午9:15 – 9:30** 问答环节  
Questions and Answers
- 上午9:30 – 9:45** 茶歇, 夏威夷皇家酒店  
Break, Royal Hawaiian
- 上午9:45 – 11:15** 会程8: 美国和中国的婚姻财产问题: 司法管辖区之间的比较  
**Session 8: Matrimonial Property Issues in the U.S. and China: A Comparison of Jurisdictions**  
本场将讨论跨境婚姻财产的问题。由于不同的婚姻财产制度、遍布全球的家庭财富配置和家庭成员所持护照的多元化, 当婚姻走向尽头时, 在何处提起离婚诉讼、如何在夫妻之间分割家庭财产以及如何处理未成年人的监护权等问题变得非常复杂。具有美国和中国背景的演讲者将分享他们在这些问题上的经验。  
Description: This session will discuss these cross-border matrimonial issues. Due to different matrimonial property regimes, global family wealth allocation and diversified family members' passports, when the marriage is coming to an end, it becomes very complicated in respect of where to file the divorce, how to split the family assets between the couples and how to deal with guardianship of the minors. The speakers with both U.S. and China background will share their experience on these issues.  
**演讲者: Speakers:**  
**郝伟盛, 律师 Wisson Hao, Attorney**  
**Joanne Zhou, 律师 Joanne Zhou, Attorney**

## 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

- 上午11:15 – 11:30 问答环节  
Questions and Answers
- 上午11:30 – 11:45 茶歇  
Break
- 上午11:45 – 下午1:15 午餐 Luncheon  
总统套房2936室  
Presidential Suite Room 2936, Sheraton Waikiki  
午餐议程3: 移民美国的迷思和陷阱  
**Luncheon Session 3: Myths and Traps of Moving to the U.S.**  
简介: 本场将讨论那些中国公民以为是真的关于美国的迷思和陷阱, 了解到大多数这些迷思和陷阱都是不真实的, 以及每个问题涉及的规则。  
Description: This session will discuss the myths and traps that many Chinese Nationals believe are true about the U.S. Learn how most of the myths and traps are untrue and the rules that surround each issue.  
**演讲者: Speakers:**  
**王文莉, 注册会计师** Wenli Wang, CPA  
**周峰, 所有者** Sam Chau, Insurance Agency Owner  
**唐元飞, 律师** Ken Tang, Attorney
- 下午1:15 – 1:30 茶歇  
Break
- 下午1:30 – 2:30 会程9: 如何在美国获得信贷  
**Session 9: How to Get Credit in the U.S.**  
简介: 本场将讨论非美国个人或实体、美国居民个人或公司、美国绿卡持有人及美国公民在美国获得信贷的能力, 了解银行或贷款机构将如何评估您的客户在美国的信贷申请, 所需满足的贷款条件, 以及各贷款申请人类型之间的差异。  
Description: This session will discuss the ability of a non-U.S. person or entity, U.S. resident person or company, U.S. green card holder and U.S. citizen to get credit in the United States. Understand how a bank or lending institution will evaluate your client's application for credit in the United States, the criteria that the lender will require and the differences between the type of applicants for a loan.  
**演讲者: Speakers:**  
**李静, 律师** Jing Li, Attorney  
**谢赞美, 副会长** Angeline Shiroma, Vice President  
**卢凯谊, 首席财富策略师** Alvina Lo, Chief Wealth Strategist
- 下午2:30 – 2:35 提交书面问题  
Submission of Written Questions

## 中美联盟项目 CHINA-U.S. ALLIANCE PROGRAM

下午2:35 – 3:20	介绍并与高级官员3对话 Introduction and Discussion with High Ranking Official 3
下午3:30 – 4:00	茶歇 – 葡萄酒和奶酪品尝会, 夏威夷喜来登威基基酒店 Break – A Gathering Wine and Cheese Sampling, Sheraton Waikiki
下午4:15 – 5:15	小组讨论 – 故事交流 Group Discussion – Talk Story
下午5:30 – 7:30	HTI晚间社交活动, 夏威夷皇家酒店皇室舞厅 HTI Evening Social Event, Monarch Ballroom, Royal Hawaiian
结束后 – After Hours	总统套房2936室 Presidential Suite Room 2936, Sheraton Waikiki

### 周四, 11月7日 THURSDAY, November 7

上午7:00 – 8:00	欧陆式早餐, 夏威夷喜来登威基基酒店 Continental Breakfast, Sheraton Waikiki
上午8:00 – 1:30	HTI美国项目 (供选择), 夏威夷喜来登威基基酒店 HTI US Program (Optional), Sheraton Waikiki

您也可以选择参加美国夏威夷税务研讨会的周四会议 (仅支持英语)

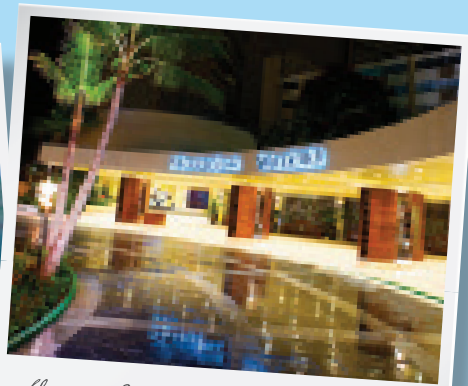
As an option, feel free to join the US Hawaii Tax Institute Conference's Thursday sessions (in English only).

\*项目详情请参阅美国夏威夷税务研讨会 (HTI) 项目手册。

\*For program details, please refer to the U.S. HTI program brochure.



*Sheraton Waikiki infinity pool*



*Sheraton Waikiki*

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Owner  
Litz USA Student Service  
Mong Kok, Hong Kong

Eddy Wu  
项目总监  
Litz USA Student Service  
香港旺角  
Eddy Wu  
Owner  
Litz USA Student Service  
Mong Kok, Hong Kong

## 重要信息 **IMPORTANT INFORMATION**

(Register Online) 网上注册：[www.hitaxinstitute.org](http://www.hitaxinstitute.org)

### 注册费用 (REGISTRATION COSTS)

中美联盟项目通行证 (China-U.S. Alliance Program Pass) **\$1,200**

HTI特别套餐：酒店和项目通行证 (Special HTI Package: Hotel and Program Pass) **\$2,600**

(本HTI特别套餐将包括在喜来登威基基度假村的5天/4晚住宿，每日欧陆式早餐和午餐，冰淇淋社交活动(周一)，茶点和饼干(周二)，葡萄酒和奶酪(周三)晚间社交活动以及非工作时间贵宾总统套房。)

(This special HTI Package will include 4 nights/5 days at Sheraton Waikiki Resort, daily continental breakfasts and lunches, ice cream social (Monday), tea & cookies (Tuesday), wine & cheese (Wednesday) evening networking events and after hours VIP Presidential room access.)

### 酒店信息 (HOTEL INFORMATION)

喜来登威基基度假村位于夏威夷檀香山的卡拉卡瓦大道2255号，邮编为96815，将是第61届夏威夷年度税务研讨会的总部。

Sheraton Waikiki Resort located at 2255 Kalakaua Avenue, Honolulu, Hawaii 96815 will be the headquarters for the 61st Annual Hawaii Tax Institute.

希望在酒店额外住宿的中美联盟注册人员，请使用HTI提供的优惠团体价格预订，每晚375美元，包含税费和度假村费用。任何额外的住宿将在注册人员入住时进行计费。

For only China-US Alliance registrants wishing to stay additional hotel nights, please book your reservations using HTI's discounted group rate of \$375/night inclusive of taxes and resort fees. Any additional nights will be charged to the registrant upon check in at the hotel.

**取消费用为295美元，不予退款。(Cancellation Fee \$295 No Refunds)**

### 资料 (MATERIALS)

每位注册参会者可提前下载和/或打印所有项目材料。

本套餐仅在10月2日之前或客房仍有余量时有效。

请立即访问 [www.hitaxinstitute.org](http://www.hitaxinstitute.org) 预订您的套餐。

有关日美联盟项目的详细信息也可在 [www.hitaxinstitute.org](http://www.hitaxinstitute.org) 上找到。

Each Registrant will have access to download and/or print all materials in advance of the program.

This package will be available only until October 2nd or while rooms remain available. Please go to [www.hitaxinstitute.org](http://www.hitaxinstitute.org) to reserve your package deal today.

Detailed information regarding the China-US Alliance program is also available at [www.hitaxinstitute.org](http://www.hitaxinstitute.org).

### 联系信息 **CONTACT INFORMATION**

电话 Telephone: (808) 540-3931

电子邮件 E-mail: [info@hitaxinstitute.org](mailto:info@hitaxinstitute.org)



夏威夷税务研讨会已经走向绿色之路。设有充电插座。

(The Hawaii Tax Institute has gone green. Recharging outlets are available)

请发送邮件至[infor@hitaxinstitute.org](mailto:infor@hitaxinstitute.org)，以便收到有关公告和更新的宣传册。

Please send an email to [infor@hitaxinstitute.org](mailto:infor@hitaxinstitute.org) to receive announcements and future brochures by email.

## IMPORTANT INFORMATION

**REGISTER ONLINE:** [www.hitaxinstitute.org](http://www.hitaxinstitute.org)

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**CANCELLATION FEE** \$295 **NO REFUNDS**

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