

An Introduction to Trusts Course

Wednesday, 2nd March 2011

Our "An Introduction to Trusts Course" will be held as a one day course for the first time in Vaduz in a similar format to our course in Zurich in previous years. The course is designed to provide practical instruction for persons working in the banking, financial, trust and fiduciary sectors in Switzerland. It will be of interest to people with relatively little experience of trusts, who wish to gain a more comprehensive knowledge of the subject.

The lectures will be given by experienced STEP members who will concentrate on the practical aspects of trust formation and administration. Comprehensive documentation will be supplied and there will be plenty of opportunity for participants to interact with the lecturers and each other. The language of the course will be English but questions and answers may also be in German.

Dates: Wednesday, 2nd March 2011 in Vaduz

Venue: to be advised

Fee: CHF 550.00 per person (plus VAT) for the course, including lunch and refreshments. This will be reduced to CHF 450.00 (plus VAT) for booking and payment prior to 31st December 2010.

Cancellations: Cancellations must be received with 7 days of the date of the Seminar and will be subject to a charge of CHF 150. It is regretted that cancellations received after this time and those not put in writing will not be accepted and the delegate will be liable for the full seminar fee. Substitutions may be made at any time provided that the organisers are notified prior to the commencement of the seminar. Please note that the participant and the organisation will have joint and several liability for payment.

Certificate: Participants who attend the whole course will receive a certificate of attendance.

Note: In order that full benefit can be obtained, participation will be restricted to the first 30 applicants who register and pay for their attendance. We shall operate a queuing system for unsuccessful applications.

We invite you to register by completing and returning the attached form. Invoices will be issued and you also have the choice of paying your invoice by credit card.

Vaduz Centre Contact: Dr. Johanna Niegel
ATU Allgemeines Treuunternehmen
Aeulestrasse 5
Postfach 83, FL-9490 Vaduz
Tel +423 237 34 34 /
Fax +423 237 37 61
Email office.frick@atu.li

Administration STEP Office
Baarerstrasse 75
Postfach 2521
CH-6302 Zug
Tel +41 (0)41 727 05 27
Fax +41 (0)41 727 05 21
Email admin@step-ch-fl.com

Programme / An Introduction to Trusts Course Vaduz

Wednesday 2nd March 2011

- 09:00 Registration and Coffee
- 09:30 AN INTRODUCTION TO TRUSTS AND THEIR USES
The origins of trust law
Uses of trusts
Settlor / Trustee / Beneficiary / Protector – their roles
Types of trusts and related issues including “letters of wishes”
Trusts v. foundations, insurance etc
Forced heirship – the issues
Asset protection – bankruptcy, professional risk, divorce
Speaker: Stephanie Jarrett, Baker & McKenzie Geneva
- 11:00 Coffee
- 11:15 HOW TO BE A GOOD TRUSTEE
How to be a good trustee
Avoiding the sham trust
Exercising discretion
The rights of beneficiaries
Confidentiality
Important court decisions/lessons to be learnt
Dealing with conflicts between the trust deed and the law
Speakers: Timothy Urquhart, Trust Consultant, Zurich
- 12:30 Lunch
- 14.00 TRUSTS AND INVESTMENTS
Right or Duty to invest the trust fund?
The trustee’s duty of care
Delegation of investment powers
Monitoring trust investments
Investing in tangibles and real estate
Speaker: Markus Heeb, Prime Advisory Group, Zurich
- 15:15 Coffee
- 15:30 **TheTrust and Civil Law**
Influence of matrimonial property and inheritance law
Liability of a Swiss trustee
Insolvency of a Swiss trust
Creditors’ rights
Information of rights of beneficiaries, settlors heirs, etc.
Speaker: Jacqueline Burkhard Bertossa,
VISCHER Anwälte und Notare Basel
- 17:00 Close for the day

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Please register by email to admin@step-ch-fl.com (please click) or by fax to 041 727 05 21
This is to confirm that I/we wish to attend this course.

.....
Name:

.....
Name:

.....
Company Name and Address (full address please):

Telephone number: Fax:.....

Email address: Signature:

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I will pay upon receipt of the invoice

Please charge my: MasterCard VisaCard and send me a confirmation / invoice
(we cannot accept Amexco)

Card No.: Expiry Date: Security No.....
(last 3 digits on the reverse side of the card)

Name of Card Holder:

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