



## SACTM Alumni Day Thursday 22<sup>nd</sup> September 2011 Hôtel Beau Rivage - Neuchâtel



Dear Friends,

As announced, SACTM is launching, for the first time, its SACTM Alumni Day. The event is a unique opportunity to bring together all professionals who have successfully passed the SACTM examinations and update them on topics of specific relevance which have undergone developments in terms of Swiss regulations relating to trusts and estate planning.

The schedule of the one-day program is the following:

9h30     **Welcome refreshments**

10h00   **Review of recent case law on trusts and developments in due diligence requirements**  
Luc THÉVENOZ and David W. WILSON

11h00 **Refreshment Break**

11h30 **Development of the use of Trusts in Switzerland**

Richard PEASE, Former chairman of STEP worldwide

12h15 **Lunch**

13h30 **Should trust companies and trustees be supervised?**

Panel :

Anne HÉRITIER LACHAT

*Chairman of the FINMA*

Adrian ESCHER

*Partner, CEO KENDRIS and Vicechairman of the Executive Committee of the Swiss Association of Trust Companies*

Tracy TEPPER

*CEO, Lombard Odier Trust Group and Member of the Bermuda Monetary Authority*

Moderator : Luc Thévenoz

14h30 **Refreshment Break**

15h00 **Developments in the taxation of Trusts**

Stephanie JARRETT and Robert DANON

16h00 **End of the Alumni Day**

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**Price : CHF 400.- (VAT 8% non included)**



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