[10 HOURS CPD]

SWISS & LIECHTENSTEIN STEP FEDERATION ALPINE CONFERENCE

THE TRUST & ESTATE PRACTITIONER'S SWISS COMBINATION KNIFE

Congress Centre Kursaal Interlaken

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Swiss and Liechtenstein STEP Federation

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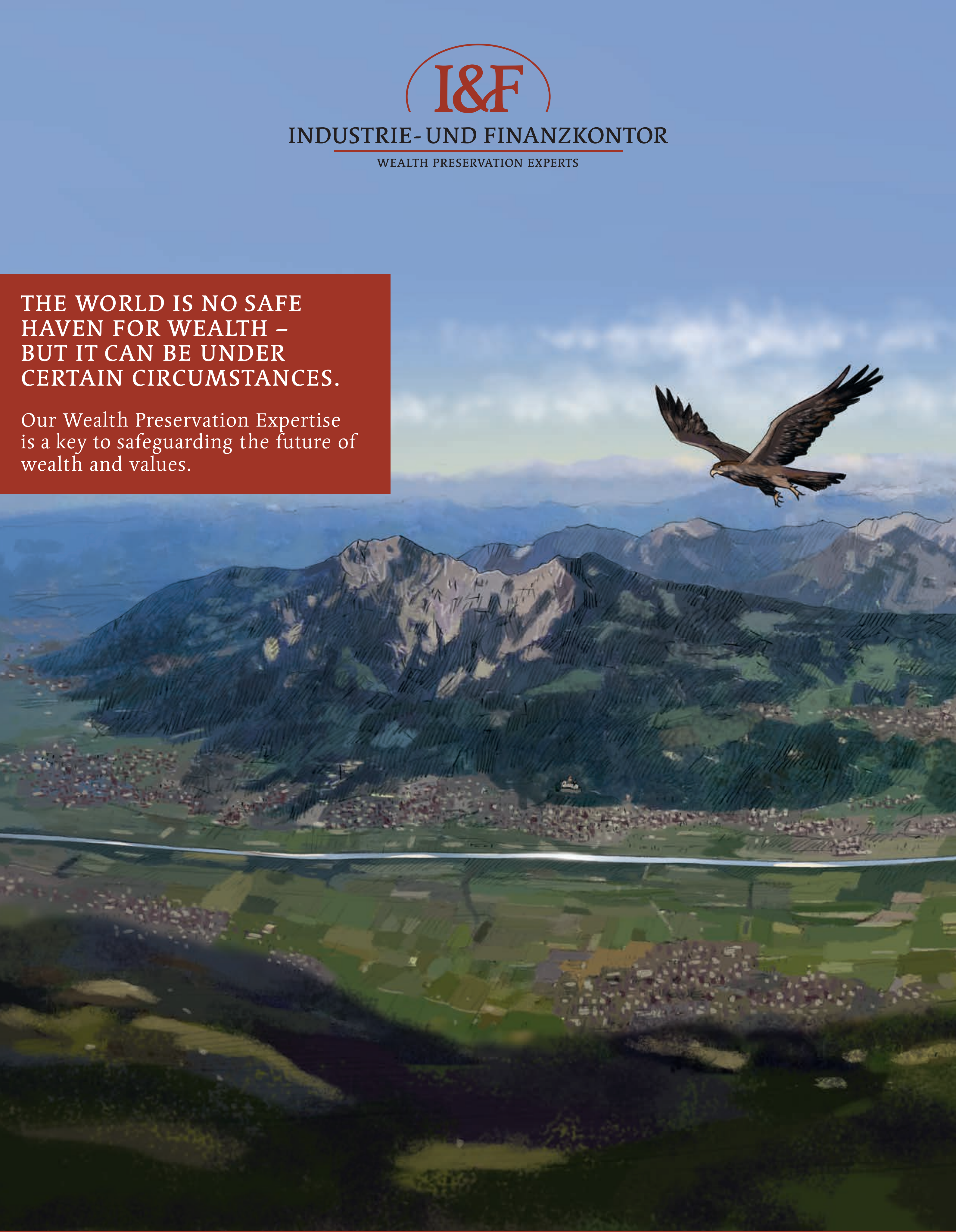


CONFERENCE WELCOME

Dear Members and Friends,

In my capacity of Chair of the Swiss and Liechtenstein STEP Federation (the « SLSF »), it is a pleasure to welcome you to the 4th annual STEP Alpine Conference in Interlaken.

At the time of writing this introduction, the Swiss Federal Council has just confirmed the entry into force on 1 January 2020 of the new Swiss trustee regulations. With this, a new era begins. Of course, for many years Swiss trustees have been regulated from an anti-money laundering perspective, but the new trustee regulations now brings into force a prudential supervision of trustees doing business in Switzerland.

In the area of the new trustee regulations, the SLSF has been very active: STEP and the Swiss Association of Trust Companies (« SATC ») created a joint working group to provide responses and inputs to the various Federal consultations, and also to assist potential Supervisory Organisations in their set-up phase. The significant time and effort expended has borne fruit: many of the joint STEP/SATC consultation responses have been included in the final Ordinances, thus improving the draft Ordinances that had previously been issued, for example in relation to more appropriate « family ties » exemptions affecting PTCs and family offices. This subject shall be covered in the session « Trustee Regulation in Switzerland », followed by a more international session on the subject of « Trust Regulation Worldwide ».

A second development facing the trust industry is the potential introduction of a substantive Swiss trust law. This subject is covered in the session « Trust Law in Switzerland – Civil Law Jurisdictions ». Some of the speakers have been directly involved in the drafting of the possible law and shall therefore be in an ideal position to discuss developments.

On the international stage, there have been many developments recently that impact trust and estate practitioners doing business in Switzerland, Liechtenstein and further afield. The recently introduced economic substance rules have a wide-ranging impact, as shall be discussed in the session « Economic Substance »; the continuing trend of increased transparency in terms of beneficial ownership registers shall be discussed in the session « Beneficial Ownership Registers of Companies and Trusts ».

In response to feedback last year, we have also included subjects on family governance, practical tips on buying, holding and selling art, and investing in real estate abroad. Further we shall review the possible use of foundations as an alternative to trusts, by having a look at the foundation laws of several jurisdictions, including Liechtenstein.

In short, there is a packed schedule for the two days that reflects the many changes being faced by STEP practitioners today both at home and abroad, and we hope that you have an informative and fun event.

As ever, the Organising Committee strive to improve the event each year, so please do not hesitate to provide feedback on the forms that you shall receive during the conference : your input is key to the future success of the conference.

ANDREW McCALLUM TEP
Managing Director, Rhone Trustees (Switzerland) SA
Chairman, Swiss & Liechtenstein STEP Federation;
Treasurer and Executive Committee Member of STEP Geneva and the Swiss Association of Trust Companies

CONFERENCE PROGRAMME

15 JANUARY 2020

18:00 **PRE-CONFERENCE DRINKS & BUFFET DINNER** - *Kindly sponsored by*

CADELL
ART: TRANSACTION ADVISORY + RISK MANAGEMENT

DAY 1
16 JANUARY 2020

THE BLADES (of the practitioner's Swiss combination knife)
Dangerous if you don't know how to use them, powerful if you master them

10:00 **REGISTRATION, BREAKFAST & NETWORKING** - *Kindly sponsored by*

BUTTERFIELD Butterfield Trust (Switzerland) Ltd

10:40 **WELCOME FROM THE SWISS & LIECHTENSTEIN STEP FEDERATION**

ANDREW McCALLUM TEP - Managing Director, Rhone Trustees (Switzerland) SA
Chairman, Swiss & Liechtenstein STEP Federation;
Treasurer of STEP Geneva Executive Committee Member
of the Swiss Association of Trust Companies

10:45 **WELCOME FROM STEP WORLDWIDE**

MARK WALLEY - Chief Executive, STEP Worldwide

10:50 **KEYNOTE ADDRESS – LEADING IN TIMES OF CHANGE**

Inga will share her experiences of bringing a centuries old institution into today's world

INGA BEALE DBE - Former CEO, Lloyds of London

11:20 **CHAIR'S OPENING REMARKS**

ANDREW McCALLUM TEP - Managing Director, Rhone Trustees (Switzerland) SA
Chairman, Swiss & Liechtenstein STEP Federation;
Treasurer of STEP Geneva Executive Committee Member
of the Swiss Association of Trust Companies

11:30 **TRUSTEE REGULATION IN SWITZERLAND**

- ***Scope:*** *Who needs a license? Are there exemptions for private trust companies and family offices?*
- ***Prudential Supervision of trustees:*** *What are the regulatory obligations that will apply to Swiss trustees?*
- ***Cross-border situations:*** *What is the impact of the Financial Institutions Act on foreign trustees?*
- ***Licensing and Supervision:*** *What needs to be done to be licensed? Who are the supervisory organisations and what is their role in the licensing process?*
- ***Supervision and Enforcement:*** *What is the role of the supervisory organisation? What is the role of FINMA? How will they interact?*
- ***Next steps and timing?***

PROFESSOR RASHID BAHAR - Partner, Bar & Karrer Ltd and Professor, University of Geneva
LEONARD VIJVERBERG TEP - Senior Associate, Lenz & Staehelin
PHILIPPE DE SALIS TEP - Partner, Head of Fiduciary, Switzerland, Stonehage Fleming SA *(Moderator)*

12:30	**LUNCH** - *Kindly sponsored by*

SwissLife Global Solutions

13:45	**TRUSTEE REGULATION WORLDWIDE (COMPARATIVE LAW)**

- *Update on regulatory changes in foreign jurisdictions*
- *PTCs – Guernsey update on licencing requirements*
- *The new Liechtenstein Governance system for trustees*
- *Quo vadis trust business? The new agenda of regulators and the possibilities of tokenisation*

PAUL DAVIS - Partner, Higgs & Johnson, Bahamas
H.S.H. PRINCE MICHAEL OF LIECHTENSTEIN TEP - Executive Chairman, Industrie- und Finanzkontor Ets., Wealth Preservation Experts
MARCUS LEESE TEP - Partner, Ogier *(Moderator)*

14:30	**ECONOMIC SUBSTANCE**

- *Why "substance" matters: In Switzerland, Liechtenstein and Offshore*
- *What "substance" means: In Switzerland, Liechtenstein and Offshore*
- *What an entity needs in order to have "substance": In Switzerland, Liechtenstein and Offshore*
- *A case study aided discussion of some common "substance" scenarios*

HERBERT BISCHOF - Managing Partner, BDO (Liechtenstein) AG
PAUL DAVIS - Partner, Higgs & Johnson, Bahamas
PROFESSOR DR PIERRE-MARIE GLAUSER - Professor, University of Lausanne and Partner, Oberson Abels SA
DAVID COONEY TEP - Partner, Charles Russell Speechlys AG *(Moderator)*

15:30	**REFRESHMENTS & NETWORKING** - *Kindly sponsored by*

SCHRODER & CO BANK AG

Schroders

16:00	**BENEFICIAL OWNERSHIP REGISTERS OF COMPANIES & TRUSTS**

- *FATF Recommendation 22*
- *The new Swiss AML duties for Trust and company service providers*
- *New Swiss AML requirements for identification of the beneficial owner*
- *Beneficial ownership registers of companies & Trusts, where we stand?*
- *Panama Papers*
- *European Union*
- *UK*
- *British Crown Dependencies and Overseas Territories*
- *Switzerland*
- *USA*

STEPHANIE AUFERIL TEP - Founding Partner, Arkwood SCP
LARS SCHLICHTING - Partner, Kellerhals Carrard
FILIPPO NOSEDA TEP - Partner, Mishcon de Reya LLP and Visiting Professor, King's College, London *(Moderator)*

CONFERENCE PROGRAMME

16:45	**SWISS TAX ISSUES : THE TWELVE DO'S & DON'TS WITH TRUSTS, UNDERLYING & STANDALONE COMPANIES**	
	JEAN-BLAISE ECKERT	- Partner, Lenz & Staehelin
17:00	**EU ISSUES / EEA**	
	• *The future relationship between the EU and Switzerland: possible scenarios* • *The future relationship between the EU, EEA and Liechtenstein: stable niche or delicate balance?* • *Fair and effective taxation: Fair for whom?* • *Priorities of new European Commission: "a Europe that protects" or a Europe that competes?* • *Implications for Switzerland and Liechtenstein: how far can tax sovereignty be upheld?* • *EU corporate tax law from a global perspective: protectionism v. competitiveness*	
	JEAN-BLAISE ECKERT	- Partner, Lenz & Staehelin
	SABINE MONAUNI	- Ambassador of Liechtenstein to the EU
	PROFESSOR DR MICHAEL WOHLGEMUTH	- Research Officer, Foundation for Economic Governance and Public Law *(Moderator)*
17:45	**DAY ONE ROUND-UP**	
17:50	**STUDENT & FOUNDERS AWARDS**	
18:30	**DRINKS RECEPTION** - *Kindly sponsored by*	
	swisspartners The art of finance.	
19:30	**GALA DINNER** - *Kindly sponsored by*	
	Schellenberg Wittmer	

[10 hours CPD]

DAY 2 - AM
17 JANUARY 2020

THE SCREWDRIVERS (of the practitioner's Swiss combination knife)
Indispensable tools to build a solid knowledge and a solid business

08:00	**BREAKFAST & NETWORKING** - *Kindly sponsored by*
	SATC Swiss Association of Trust Companies
08:50	**CHAIR'S OPENING REMARKS**
	DR GUILLAUME GRISEL TEP Swiss & Liechtenstein STEP Federation
09:00	**FAMILY GOVERNANCE**

- *Relevance of psychology in Family Governance*
- *What is Family Governance?*
- *How do you persuade a family that a Family Governance exercise is worthwhile?*
- *Getting family members to "buy in" to a Governance structure*
- *Does a good Governance arrangement necessarily avoid family disputes?*
- *Dealing with incapacity and divorce*
- *Does fair mean equal?*
- *Family Governance and technology*

KECIA BARKAWI TEP - Founder & CEO, VALUEworks
DINA CASPARIS - Independent Lawyer, Advisor and Novelist
ETIENNE D'ARENBERG - Partner, Mirabaud & Cie SA
NICHOLAS JACOB TEP - Partner, Forsters LLP *(Moderator)*

10:00 **ART ASSETS: PRACTICAL ADVICE FOR TRUSTEES WHEN BUYING, HOLDING AND SELLING**

- ***Buying*** *- How to navigate a purchase in an unregulated market where conflicts of interest and high levels of knowledge "asymmetry" are serious concerns*
- ***Holding*** *- Practical tips for the on-going care of a collection covering the importance of maintaining confidentiality, valuations and insurance coverage, record keeping, environmental control, museum loans, free ports, logistics and curators*
- ***Selling*** *- How to maximise the outcome of a sale process (while managing risk) by introducing competition and thorough due diligence*

SANDRINE GIROUD - Partner, LALIVE
AMANDA GRAY - Partner, Mishcon de Reya
WILLEM-JOOST DE GIER - Co-Founder, Cadell *(Moderator)*

10:45 **REFRESHMENTS & NETWORKING** - *Kindly sponsored by*

Döhle CORPORATE AND TRUST

11:15	**INVESTING IN REAL ESTATE ABROAD**

- *Key civil/practical angles to residential real estate investment across borders*
- *Key tax drivers of such investments*
- *Succession/holding structure issues*
- *Tax and estate inheritance considerations in each scenario*
- *Which tail is wagging which dog?*
- *The latest trends and themes covering the movement of wealth and wealthy individuals globally*
- *The implications of these flows for prime residential markets across the world*
- *A brief review of trust and the legal system in Israel*
- *Outward investments of Israeli residents in real estate overseas*
- *Inward investments of foreign residents in real estate in Israel*

LIAM BAILEY - Global Head of Research, Knight Frank
DR ALON KAPLAN TEP - Advocate and Notary, Alon Kaplan Law
EDWARD REED TEP - Partner, Macfarlanes LLP *(Moderator)*

12:00	**FOUNDATION LAW**

- *Succession planning via Foundations and Trusts including regulatory issues*
- *Use of Foundations compared to trusts. Where have Foundations been used, and is there a recurring theme for why they are used ?*
- *What are the main differences in uses compared to Trusts ?*
- *The International Foundation Landscape–from civil law countries (Liechtenstein, Austria, Panama) to the Caribbean, via Jersey, Guernsey, IOM, Gibraltar to the United Arab Emirates and the US (New Hampshire, Wyoming)*
- *How do these Foundations differ and what do they have in common ?*
- *Swiss Foundations and update on what changes may be coming in Switzerland re Foundations*

CHRISTOPHE JOLK - Partner, BMH Avocats
PAOLO PANICO TEP - Chairman, Private Trustees SA, Luxembourg & Advocate, Paolo Panico's Law Chambers
DR NATALIE PETER TEP - Partner, Blum & Grob Attorneys at Law Ltd
DR JOHANNA NIEGEL TEP - Senior Client Advisor, Allgemeines Treuunternehmen (ATU), Committee Member of Verein STEP, Chairman, Vaduz Centre *(Moderator)*

12:45	**LUNCH & NETWORKING**

[10 hours CPD]

DAY 2 - PM
17 JANUARY 2020

THE COMPASS (of the practitioners Swiss combination knife)
Because we need to know where we are and where to go

13:55	**CHAIR'S OPENING REMARKS**		
	CYRIL BOUZGUIR TEP	-	Banking Economist, Dreyfus Sons & Co Ltd, Banquiers Committee Member of Swiss & Liechtenstein STEP Federation Committee Member of STEP Basel
14:00	**TRUST LAW IN SWITZERLAND – CIVIL LAW JURISDICTIONS**		
	• *Update on the draft Swiss trust law* • *Back to our Roman roots* • *Beyond the usual issues raised in civil law countries*		
	PROFESSOR DR FRANCESCO A SCHURR TEP	-	Professor of Law, University of Innsbruck
	PROFESSOR DR LUC THEVENOZ	-	Professor, University of Geneva Director, Centre for Banking and Financial Law
	DAVID WILSON TEP	-	Partner, Schellenberg Wittmer Ltd *(Moderator)*
15:00	**REFRESHMENTS & NETWORKING**		
15:30	**THE GREAT DEBATE**		
	NICHOLAS JACOB TEP	-	Partner, Forsters LLP
	JUSTINE MARKOVITZ TEP	-	Chairperson, Withersworldwide
	PROFESSOR DR DOMINIQUE JAKOB	-	Professor of Private Law and Director of the Center for Foundation Law at the University of Zurich / Independent Advisor, Zurich
	PROFESSOR DR LUC THEVENOZ	-	Professor, University of Geneva Director, Centre for Banking and Financial Law *(Moderator)*
16:30	**CONFERENCE ROUND-UP & CLOSE**		

ORGANISING COMMITTEE

ANDREW McCALLUM TEP

Managing Director, Rhone Trustees (Switzerland) SA; Chairman, Swiss & Liechtenstein STEP Federation; Treasurer and Executive Committee Member of STEP Geneva and the Swiss Association of Trust Companies

Andrew McCallum is managing director at Rhone Trustees (Switzerland) SA in Geneva. Andrew is a trustee for various UHNW and HNW families, and also specialises in the accounting and auditing of trust and corporate structures.

Andrew is a UK qualified chartered accountant, and is a registered auditor in Switzerland, the UK and Ireland. He is treasurer and a committee member of STEP Geneva, sits on the STEP Worldwide professional standards committee, and has been a co-organiser of the STEP Switzerland and Liechtenstein Alpine Conference since its inception. He is also a long-standing member of the audit and risk commission of the International Federation of Red Cross and Red Crescent Societies.

DR GUILLAUME GRISEL TEP

Partner, Bonnard Lawson
Vice-Chairman, Swiss & Liechtenstein STEP Federation

Dr Guillaume Grisel is a partner at Bonnard Lawson - international law firm. He is a recognized expert in tax and estate planning, trust law, international taxation and financial institutions regulation. Guillaume advises international families, artists, sportsmen and art collectors, but also trust companies and family offices, and he regularly serves as protector of trusts.

Guillaume has held various positions on STEP committees, namely as Vice-Chairman and Chairman of STEP Lausanne and as Secretary and Vice-Chairman of the Swiss & Liechtenstein STEP Federation. Guillaume is Chairman of the Lausanne Committee of the British-Swiss Chamber of Commerce (BSCC). He regularly publishes, speaks and teaches at conferences. He is the author of a new book: "Le trust en Suisse", Zurich 2020

DR JOHANNA NIEGEL TEP

Senior Client Advisor, Allgemeines Treuunternehmen (ATU), Committee Member of Verein STEP, Chairman, Vaduz Centre

Dr Johanna Niegel joined Allgemeines Treuunternehmen (ATU) after having worked with international law firms in Moscow, New York, Budapest, and Vienna. She has specialized in the comparative analysis of international private foundations and trusts, teaching trust law in the master programme at the University of Liechtenstein. Johanna has been editing Trusts & Trustees 'Private Foundations: A World Review' from its inception in 2004 and is also an editor to the survey book entitled 'Private Foundations World Survey', published by Oxford University Press in August 2013. Johanna took a doctorate in law at the University of Vienna Law School, Austria, and graduated with a master's degree from Columbia University School of Law, New York, having obtained a Fulbright scholarship. She was named a Harlan Fiske Stone Scholar for Superior Academic Achievement and holds the Parker School Recognition of Achievement with Honors in International and Foreign Law. Johanna is the Chairman of STEP Liechtenstein and was awarded the STEP Founder's Award in 2017.

CYRIL BOUZGUIR TEP

Banking Economist,
Dreyfus Sons & Co Ltd, Banquiers
Committee Member of Swiss & Liechtenstein STEP Federation
Committee Member of STEP Basel

Cyril Bouzguir has an advanced federal diploma in Banking and Finance and is currently working for Dreyfus Sons & Co Ltd, Banquiers, one of the oldest, family owned private banks in Switzerland.

He has worked in the private banking industry for over twelve years and his main responsibilities include compliance and administration of existing and future client relationships, with focus on trust and corporate accounts. Cyril is a specialist in financial regulations and involved in different projects such as FATCA, CRS and development of Banking Software.

Cyril serves as committee member and liaison officer of STEP Basel and is fluent in four languages.

CONFERENCE SPEAKERS/MODERATORS

KEYNOTE SPEAKER
INGA BEALE DBE

Former CEO
Lloyds of London

Dame Inga Beale is a British businesswoman and the former CEO of Lloyd's of London – the 330-year-old insurance and reinsurance market. With over 35 years of global experience in financial services she was awarded her damehood in 2017 for services to the UK economy. During her 5 year tenure at Lloyd's, Inga modernised the $40 billion insurance giant through the introduction of technology, moving it from a paper-based market to an electronic trading environment. She embedded a culture of innovation with the opening of the Lloyd's Innovation Lab in the heart of the market, and expanded into new, high-growth markets including China, Dubai, and India. As the first female CEO of Lloyd's, she also played a critical role in advancing diversity and inclusion initiatives across the global insurance sector. Prior to Lloyd's and from her early days in the 80's as a trainee at the Prudential in London, Inga has lived in various countries, taken on global CEO roles for insurance groups Canopius in London and Converium in Zurich, and been in executive leadership roles at large financial institutions such as Zurich Insurance.

STEPHANIE AUFERIL TEP

Founding Partner
Arkwood SCP

Stephanie Auferil is a founding partner of Arkwood SCP.

Stephanie advises the families on all their wealth management issues, notably cross border. Her expertise is particularly recognized in the following areas of French-US strategies: assistance to US individuals relocating or investing in France, or to French individuals relocating in the US, wealth planning via trust for foreign families investing in France, with a focus on US persons and assistance to families and family businesses in their structuring, development and estate planning in a domestic and international context.

PROFESSOR RASHID BAHAR

Partner, Bar & Karrer Ltd
Professor at the University of Geneva

Rashid Bahar's practice focuses on banking, finance and capital markets, as well as general corporate law. He heads the funds, financial products and asset management practice group. He regularly advises Swiss and foreign financial institutions on transactional and regulatory matters. He is often involved in M&A transactions and complex financings, where he advises both lenders and borrowers. He regularly represents clients in licensing and enforcement proceedings before the Swiss Financial Market Supervisory Authority FINMA and other authorities. Rashid Bahar is also an associate professor at the University of Geneva, where he teaches corporate law and financial markets regulation. He was appointed as an expert member of the working group of the Federal Department of Finance responsible for drafting the Federal Act of Financial Services (FIDLEG) and its implementing ordinance.

LIAM BAILEY

Global Head of Research
Knight Frank

Liam is head of Knight Frank's global research team, which is headquartered in London but with key hubs in over 25 global markets. While Liam's remit covers residential and commercial property research and insight – he has developed an unrivalled position as a commentator on luxury residential and wealth trends. In 2008 Liam created Knight Frank's signature publication The Wealth Report which has become the recognised authority on global property and wealth. The Wealth Report's unique perspective on: property and luxury investment performance; wealth sizing; capital movements and trend forecasts has made it a must-read for the world's leading wealth advisors and family offices. Liam's focus over recent years has been to ensure that Knight Frank have access to the best talent in research and market intelligence – leading to significant investment in data, analytics and geospatial technologies to enhance the insight delivered to clients across the property sector. The team collectively have the ability to support client requirements globally – with Liam able to direct resources to best suit these needs.

CONFERENCE SPEAKERS/MODERATORS

KECIA BARKAWI TEP

Founder & CEO
VALUEworks

Since founding the multi-family office VALUEworks in 2004, Kecia Barkawi has led the development of its innovative, holistic service offering. She started her career with GAM in Zurich and Bermuda, before joining STG Coopers & Lybrand's private client team as vice president. She speaks and publishes on family governance, communication, philanthropy and trust matters. Kecia is a member of the Society of Trust and Estate Practitioners (STEP), Deputy Chair of its global SIG Business Families and served as judge at the STEP Private Client Awards. She spearheaded the creation of the Swiss Association of Trust Companies (SATC), which she presided from 2007 to 2012. Kecia's passion for strategic philanthropic giving led her to co-found the Zurich Roundtable of Philanthropy and initiate the exclusive Swiss Women + Philanthropy Network. Kecia has a Master in Law from Zurich University and an MBA from Heriott Watt University. Citywealth has named Kecia among its IFC Power Women from 2013 to 2019.

HERBERT BISCHOF

Managing Partner
BDO (Liechtenstein) AG

Herbert Bischof is registered trustee in Liechtenstein as well as chartered accountant in Liechtenstein and Switzerland. He is member of Liechtensteinische Treuhandkammer as well as Liechtensteinische Wirtschaftsprüfer-Vereinigung, where he also acts as a board member. In 2008 he founded the PFI-Group and has been a Board Member and Managing Partner of BDO (Liechtenstein) AG since 2013.

His strong focus on IT, quality management and risk assessment are supported by educations and diplomas as IS Manager and IS Auditor according to ISO 20000 and 27000, EFQM Assessor and Risk Manager according to ISO 31000.

DINA CASPARIS

Independent Lawyer,
Advisor and Novelist

Dina Casparis is a Swiss attorney-at-law and writer. She has advised international families and family enterprises for many years, both at a Zurich based law firm and as a wealth advisor at an international wealth manager and at an insurance company.

As an independent lawyer she successfully led the setup of the Swiss branch for a Luxemburg Life Insurance Company. Her experience also comprises acting as a board member of a family office.

Today she is the trusted advisor of international families, both concerning their individual as well as corporate affairs, and Swiss charities. She first joined STEP in 2000.

Dina Casparis is currently writing the sequel her of her first novel (www.high-heels-heisse-deals.com).

DAVID COONEY TEP

Partner
Charles Russell Speechlys AG

David Cooney is an English solicitor and UK chartered tax advisor, who was also admitted as a Cayman Islands attorney at law and a BVI solicitor. He is a STEP member and STEP Zurich Committee member. David specialises in international structures, particularly private client structures. Before relocating to Zurich, David was based in the Cayman Islands where he was a partner and the head of the private client and trusts team of a large offshore firm, responsible for Cayman and BVI. He advises individuals, families, trustees and private banks on all aspects of succession and estate planning, including the use of trust and corporate structures. David has advised trustees in several jurisdictions (including Switzerland) on the impact of Economic Substance laws on their business, the implementation of arrangements to apply the economic substance rules to large numbers of entities, and the differences between the rules in place in many of the participating jurisdictions. He has also provided advice to many entities to help them apply the economic substance rules and to meet the requirements of any economic substance test.

CONFERENCE SPEAKERS/MODERATORS

ETIENNE D'ARENBERG

Partner
Mirabaud & Cie SA

Etienne d'Arenberg has been a limited partner at Mirabaud & Cie SA since 2011. He joined the group in 1999. Since 2016, he manages the UK market and sits on the board of Mirabaud Europe Ltd, the European bank of the group.

He also sits on the board of his own family's Family Office. From 1995 to 1999, he was a MD at Creditanstalt Investment Bank in Vienna focusing on CEE countries. Prior to that, he was a development analyst in Paris for a subsidiary of Compagnie Générale des Eaux. He sits on, or chairs several charity boards, most linked to music. He holds a MSc (Mgt) from Boston University and graduated from the Lausanne Hotel School.

PAUL DAVIS

Partner
Higgs & Johnson, Bahamas

Paul Davis is a partner at Higgs & Johnson in the private client and wealth management group. His practice focuses on trusts, private trust companies, purpose trusts, foundations, executive entities, financial services law and regulation, and corporate law. He provides counsel to financial institutions (including trustees), individuals and beneficiaries in the establishment and administration of fiduciary structures.

Paul is Deputy Chairman of the Bahamas Financial Services Board (BFSB) and Co-chair of the BFSB's Trusts Working Group, which has a mandate to ensure the regular review of trust legislation in The Bahamas.

WILLEM-JOOST DE GIER

Co-Founder
Cadell

Willem is a Co-Founder of Cadell - the first and only art advisory firm regulated by the Financial Conduct Authority. Cadell provides the Private Client industry with blue chip, truly independent advice in a sector where undeclared conflicts present a serious risk to clients. Willem works with over 30 top Legal Firms, Professional Trustees and Family Offices delivering professional grade selling, buying and valuation advice for art, decorative objects, furniture and jewellery worth $300-500m per year. Cadell covers all client needs at every value level, values for individual works can range from a few thousand up to many millions. Willem is supported by Cadell's team of 26 highly experienced independent sector experts. He advises on clients primarily in London, Geneva, Lausanne, Zurich, Monaco, Jersey, Guernsey and the Isle of Man. A former global Executive Management Board member at Christies, Willem was responsible for Group Operations. Additionally, Willem has a background in Corporate Finance, Risk Management and Management Consulting. He has also advised major Private Equity investors in the art sector.

PHILIPPE DE SALIS TEP

Partner, Head of Fiduciary,
Switzerland
Stonehage Fleming SA

Philippe joined the Group in 2007 after working for several years as an Attorney at law in Berne and Geneva, specialising in corporate and commercial law. Philippe graduated from the University of Zurich in 1996 with a Law degree. He qualified as an Attorney at law and was admitted to the Bar of the Canton of Berne in 1999. Philippe also obtained a Post Graduate diploma in Law from the University of Geneva in 2004. Philippe is a member of the Society of Trust and Estate Practitioners (STEP) and a co-editor of STEP's Trust Quarterly Review. He is also Chairman of the Swiss Association of Trust Companies (SATC).

CONFERENCE SPEAKERS/MODERATORS

JEAN-BLAISE ECKERT

Partner
Lenz & Staehelin

Jean-Blaise Eckert is a partner at Lenz & Staehelin and co-head of the tax group. His practice areas include tax, private clients, contract law and commercial.

He speaks French, English and German. Jean-Blaise studied law at the University of Neuchâtel and was admitted to the Bar of Neuchâtel in 1989 and to the Bar of Geneva in 1991. He studied business administration at Berkeley, Haas Business School, where he acquired an MBA in 1991. He received his diploma as a Certified Tax Expert in 1994 and is a Certified Specialist in Inheritance Law.

Jean-Blaise is considered as a leading lawyer in Switzerland. He advises a number of multinational groups of companies as well as HNWIs. He sits on the board of a number of public and private companies. Jean-Blaise is a frequent speaker at professional conferences on tax matters. Jean-Blaise is Secretary General of the International Fiscal Association (IFA).

SANDRINE GIROUD

Partner
LALIVE

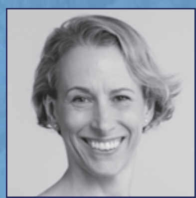
Sandrine Giroud is a partner with LALIVE specialising in domestic and international litigation (civil, commercial and white collar crime), art and cultural property, trust and estate, media law, as well as public international law (including immunities from jurisdiction and enforcement) and human rights. As part of her practice, she represents collectors, art market professionals and museums on dispute resolution and transactional matters in art.

She is a member of the Executive Board as well as President of the Human Rights Committee of the Geneva Bar Association (ODA). She is also a member of the Board of the Swiss National Museum, the Board of the Art Law Foundation (which she has co-directed from 2014 to 2017), the Task Force of the Responsible Art Market Initiative (RAM), as well as the Professional Advisors to the International Art Market (PAIAM).

PROFESSOR DR PIERRE-MARIE GLAUSER

Professor, University of Lausanne
Partner, Oberson Abels SA

Pierre-Marie Glauser is professor at the University of Lausanne, faculty of business (*Faculté HEC*). He is also a partner of Oberson Abels SA, a Swiss based Law Firm specialised in business and in tax matters. His teaching and research topics cover corporate tax matters, in particular in the field of Mergers & Acquisitions, financing and general tax matters pertaining to the company and its shareholders, as well as VAT. His research in the field of VAT and corporate tax law gave rise to numerous contributions in several tax journals. He also regularly appears in conferences where he speaks on his research topics. Pierre-Marie is also member of the Federal Supervisory Board of the VAT Administration and participated actively to the issuance of a new VAT law in Switzerland. He holds a PhD in tax law from the University in Geneva and a Master in Law (Lic. iur. HSG) and in business (Lic. oec HSG) from the University of St. Gallen. He is also a certified Swiss Tax Expert and an attorney at law admitted to the bar.



AMANDA GRAY

Partner
Mishcon de Reya LLP

Amanda is a Partner in Mishcon Private at Mishcon de Reya, specialising in Art Law. Amanda works on both contentious and non-contentious matters including, but not limited to, disputes arising over all due diligence matters (for example title, authenticity (including Holocaust restitution claims), attribution and condition) contractual disputes and special project work concerning arts and cultural property. With regard to the complementary specialism of Luxury Assets she is known for her contentious expertise on matters concerning classic cars – issues arising on authentication and ownership (most notably– Copley Motorcars Corporation & Anr v Bonhams 1793 Limited & Ors in multi-party proceedings in the Commercial Court involving, inter alia, claims of fraud and misrepresentation), antiquities, equines, and yachts. Amanda is regularly asked to present at speaking engagements globally, including the Royal Academy of Arts School, Christie's Education, the Courtauld, Queen Mary University and the Royal Society of Sculptors.

CONFERENCE SPEAKERS/MODERATORS

NICHOLAS JACOB TEP

Partner
Forsters LLP

Nicholas Jacob, since qualifying in 1982, has specialised in taxation and trusts and is a specialist in Family Governance and Succession Planning. He focusses on the psychological issues as well as the legal issues, thus providing a holistic exercise. He advises trustees all over the world. In particular, he acts for a number of substantial institutions in relation to trust drafting, risk assessment and other non-contentious issues. One of his other specialisations is acting for trustees in situations where beneficiaries are divorcing. He has been nominated by Who's Who as one of the top ten private client practitioners in the world, is listed in the top category globally in Chambers Global Legal Directory. A significant part of his practice in acting for clients from Hong Kong, Singapore, and other East Asian countries, as well as a number of major shareholders in listed and private companies. Nick has recently retired from the International Board of The Society of Trust and Estate Practitioners (STEP). He is also a member of the International Fiscal Association and the International Tax Planning Association.

PROFESSOR DR DOMINIQUE JAKOB

Professor of Private Law and Director of the Center for Foundation Law at the University of Zurich / Independent Advisor, Zurich

Dominique Jakob is a professor of private law at the University of Zurich. Being of German origin, he was appointed as a full professor at the University of Zurich in 2007 where he established the "Center for Foundation Law" in 2008. Next to his University work, he has developed a national and international private practice. His main fields are all aspects of foundation law (with a focus on Swiss, Liechtenstein, and German relations) as well as international estate and wealth panning (including trusts).

He is author of numerous publications, a sought after speaker, board member of various institutions, and acts as independent counsel to governments, financial institutions, companies, foundations, associations, families, and private clients. Dominique is a member of the International Academy of Estate and Trust Law (TIAETL) and has been elected in the Private Client Global Elite since 2017.

CHRISTOPHE JOLK

Partner
BMH Avocats

Christophe Jolk is a French and German citizen and a tax partner with the Paris law firm BMHAVOCATS.

Christophe has a multicultural background and is registered with the bars of Paris, New-York and Luxembourg.

His practice focuses mainly on cross-border corporate acquisitions or structuring strategies, as well as complex international private clients' tax matters.

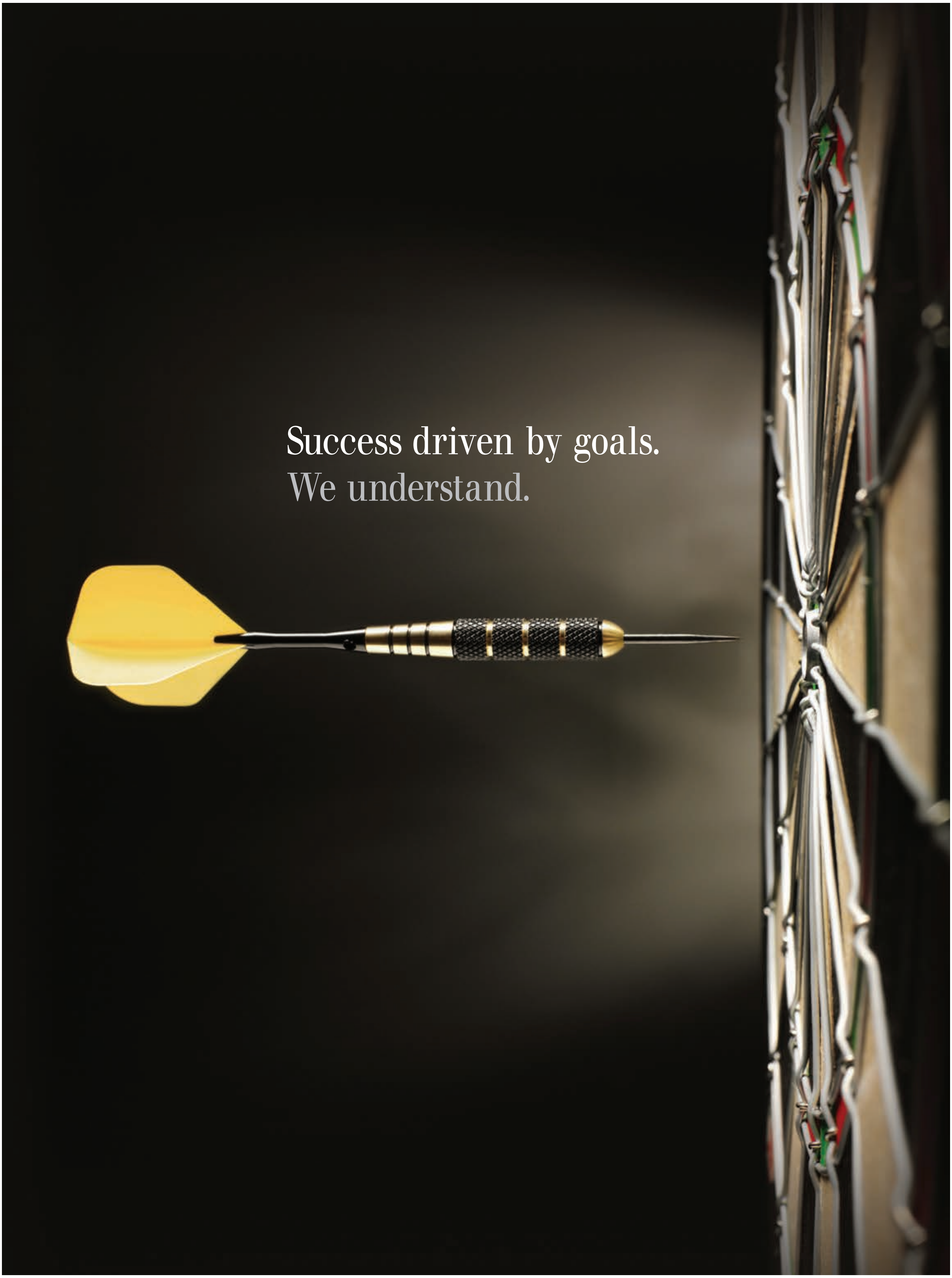
DR ALON KAPLAN TEP

Advocate & Notary
Alon Kaplan Law

Alon Kaplan is a member of the Israel, New York State and Frankfurt Bars. Alon received his PhD qualification from Zurich University.

Alon is a member of STEP and President of STEP Israel. He is an Academician at the International Academy of Estate and Trust Law, and a Fellow of the American College of Trust and Estate Counsel. Alon publishes regularly in distinguished professional publications and speaks at seminars and conferences internationally.

He is the general editor of Trusts in Prime Jurisdictions, 5th edition in process, and author of several other books on Trusts and Estate.



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CONFERENCE SPEAKERS/MODERATORS

MARCUS LEESE TEP

Partner
Ogier

Marcus has a broad practice but with a particular focus on private client, trusts, foundations, wills and estates (and related banking and finance, corporate and commercial work) for high net worth entrepreneurial clients and their businesses. He is an admitted and practising lawyer in both the BVI and Guernsey. He is also admitted as a barrister and solicitor of the High Court of New Zealand and as a solicitor of the High Court of England and Wales.

He joined the Guernsey office of Ogier in 1999 and became a partner in 2005. He relocated to Ogier's Hong Kong office in 2010 on a four year secondment and returned to Guernsey in January 2014.

H.S.H. PRINCE MICHAEL OF LIECHTENSTEIN TEP

Executive Chairman
Industrie- und Finanzkontor Ets.,
Wealth Preservation Experts

Prince Michael of Liechtenstein is executive chairman of Industrie- und Finanzkontor Ets., a leading trust company with a specific tradition and expertise in the long-term and multi-generational preservation of wealth, family values and businesses. Furthermore, he is also the founder and chairman of Geopolitical Intelligence Services AG, a geopolitical consultancy company, and information platform.

In addition, Prince Michael of Liechtenstein is a member of various professional organizations such as STEP, a board member of the Liechtenstein Institute of Professional Trustees and Fiduciaries, as well as chairman of the liberal think tank European Center of Austrian Economics Foundation.

JUSTINE MARKOVITZ TEP

Chairperson
Withersworldwide

Justine became global chairperson of Withersworldwide in July 2019 and is a partner in the Private Client and Tax team. She focuses on advising private clients and financial institutions in relation to international tax, trusts and estate planning and on advising families on succession and governance issues. She works with families to create structures and other legal solutions to implement their long-term succession plans both for their personal assets and their business interests. Justine consistently features in eprivateclient's 50 Most Influential list of wealth industry advisors, as well as the Private Client Global Elite. She is Ranked in Band 1 by Chambers for Private Wealth Law in Switzerland, and led the Swiss practice to win the *Legal Team* and *Estate Planning Team* awards at *WealthBriefing's* 2019 Swiss Awards. Justine is Vice President of the Suisse-Romande branch of the Society of Trust and Estate Practitioners and a member of several other Private Client and Tax associations. She regularly speaks at wealth industry and estate planning events around the world.

SABINE MONAUNI

Ambassador of Liechtenstein
to the EU

Ambassador Monauni is Head of the Mission of the Principality of Liechtenstein to the European Union in Brussels since July 2016. She started her professional career as a Legal Officer in the EEA Coordination Unit of the Liechtenstein Government, where she later worked as a Deputy Director for many years. In 2010 she was appointed as the Liechtenstein member of the College of the EFTA Surveillance Authority in Brussels, which is the responsible body for the supervision and enforcement of the obligations of Iceland, Liechtenstein and Norway under the EEA Agreement. In 2014 she returned back to the Liechtenstein Foreign Service before she became a Senior Advisor of the Minister of Social Affairs.

Sabine Monauni holds a law degree from the University of St Gallen as well as a Master of European Law (LL.M.) of the College of Europe in Bruges, Belgium.

CONFERENCE SPEAKERS/MODERATORS

FILIPPO NOSEDA TEP

Partner
Mishcon de Reya LLP
Visiting Professor, King's College, London

Filippo Noseda is a Partner at Mishcon de Reya in London. He is qualified in the UK and Switzerland and is also admitted in the BVI. He handles cross-border tax and estate planning for international families, with a particular niche practice in advising governments on the law of foundations. He is particularly well known for his publishing and speaking on the Common Reporting Standard (CRS). He appeared as an expert before the Council of Europe and the EU data protection authorities in connection with the introduction of the OECD's CRS and the EU's Beneficial Ownership Registers. Filippo is a member of the Society of Trust and Estate Practitioners (STEP) and the International Academy of Estate and Trust Law. A keen lecturer and avid commentator, he is rated as a leading individual in The Legal 500 and CityWealth Leaders list, a Top Recommended Tax Lawyer by Spear's Magazine and as one of the UK Top Influential Private Client Lawyers by ePrivateclient.

PAOLO PANICO TEP

Chairman
Private Trustees SA, Luxembourg
Paolo Panico's Law Chambers

Paolo Panico is an "avocat à la Cour" in Luxembourg, a Scottish solicitor, and an advocate in Romania. He is also Chairman of Private Trustees SA, an independent trust and corporate service provider in Luxembourg. He has an academic interest in the law regarding trusts and foundations and teaches courses at the University of Luxembourg and at the University of Liechtenstein.

He has published amongst other works, *Private Foundations. Law and Practice* (Oxford University Press, 2014) and *International Trust Laws* (2nd edition, Oxford University Press, 2017). He is an academic of The International Academy of Estate and Trust Law, deputy chairman of the International Tax Planning Association (ITPA) and Chairman of the STEP Europe Region.

DR NATALIE PETER TEP

Partner
Blum & Grob Attorneys at Law Ltd

Dr. Natalie Peter LL.M., TEP a Partner of the Zurich law firm Blum & Grob Attorneys at Law and is heading the firm's private client team. She has extensive experience in advising clients and their families typically on their cross-border matters, including estate and tax planning; immigration to/emigration from Switzerland; and analyzing and setting up tax-efficient structures.

She has a particularly extensive knowledge in matters relating to the taxation of trusts and foundations as well as the setting-up of tax-exempt charitable organizations. She is recognised as a top professional in various directories and a frequent speaker and lecturer.

EDWARD REED TEP

Partner – Private Client
Macfarlanes LLP

Edward advises on UK and international wills, trusts and personal tax planning. He is a trustee or protector of a number of private and charitable trusts, many of which are administered within Macfarlanes' trust administration group. Having been educated both in the UK and in France, Edward has developed an affinity for civil law issues generally. He also advises clients on philanthropic issues. He advises on UK immigration and nationality law and procedure for private and corporate clients.

Edward is a contributor to Tolley's Administration of Trusts. He is also co-author of the "Trusts, Trustees and the UK Anti Financial Crime Regime", chapter (C11) in Glasson, The International Trust (3rd Ed. 2011). Edward is a member of the Capital Taxes Sub-Committee of the Law Society's Tax Law Committee, the immediate past Chairman of the steering committee of the Cross-Border Estates Group of STEP and a trustee of The Friends of the Institut Francais and the David Brownlow Charitable Foundation.

CONFERENCE SPEAKERS/MODERATORS

LARS SCHLICHTING

Partner
Kellerhals Carrard

In 1999, Lars was admitted to the Ticino bar. Subsequently, he completed a LL.M. degree in international business law at the University of Zurich in 2006. He worked at the legal department of the Swiss Federal Banking Commission for 5 years and as Partner in at KPMG for 10 years. Since 2018 he is leading the Financial Services and Digital Market Team at Kellerhals Carrard Lugano. His key areas of experience are technology, regulatory and tax laws. He advises corporate clients in the application of new technologies like blockchain, as well as in the compliance in financial laws. In particular he is a specialist in anti-money laundering legislation, banking legislation and securities law. Further, he has extensive knowledge and experience in the tax field, especially automatic exchange of information and FATCA. Lars Schlichting has issued numerous publications, among other concerning the consolidate supervision of financial groups, and the comments of the financial services laws and the automatic exchange of information act.

PROFESSOR DR FRANCESCO A SCHURR TEP

Professor of Law
University of Innsbruck

Professor Dr. Francesco A Schurr is a Professor of Law (Chair for Italian Private Law and Comparative Law) at the School of Law, University of Innsbruck, Austria as well as Professor at the Institute of Business Law, University of Liechtenstein.

Francesco's main research interests are Law of Trusts and Foundations, Corporate Law as well as Contracts and Consumer Protection. He is admitted to be the Bar in Italy and Germany.

PROFESSOR DR LUC THEVENOZ

Professor, University of Geneva
Director, Centre for Banking and Financial Law

Luc Thévenoz has worked extensively on trusts. He is the author of the 2001 report which served as the basis for Switzerland's ratification of the Hague Trusts Convention. He is presently one of the experts advising the government for the drafting of a Swiss trust law. His other areas of expertise are contracts, banking, and financial services.

Luc served as commissioner of the Federal Banking Commission and chair of the Swiss Takeover Board. He advised on numerous legislative and regulatory projects. He is admitted to the Bar. He is an honorary member of STEP.

LEONARD VIJVERBERG TEP

Senior Associate
Lenz & Staehelin

Leonard Vijverberg is a Dutch qualified lawyer and a senior associate in Lenz & Staehelin's Private Client group in Geneva since July 2007. His practice includes advising on international estate planning, art, issues of international private law, international investment and corporate structures as well as contract and commercial law.

Leonard has particular expertise in the field of trusts and foundations. He advises trust companies on regulatory matters and in relation to trust litigation.

CONFERENCE SPEAKERS/MODERATORS

DAVID WALLACE WILSON TEP

Partner
Schellenberg Wittmer Ltd

David Wallace Wilson is a partner with Schellenberg Wittmer's private clients and estates practice in Switzerland. He advises individuals and families on wealth structuring and estate planning for their personal and business assets. He also acts in complex guardianship and inheritance disputes, including administering international successions. Additional areas of expertise include anti-money laundering and art law.

David is the chairman of STEP Geneva (officer since 2004) and sits on the STEP International Client Global SIG Committee. He is also the founder of the leading website on trusts in Switzerland, www.trusts.ch.

David is recognised by leading Private Client legal publications: Private Client Global Elite (Legal Week), Citywealth and the WealthBriefing Awards.

MARK WALLEY

CEO
STEP Worldwide

Mark joined STEP as Chief Executive in January 2019. Prior to joining STEP, Mark worked as Managing Director, EMEA at the Royal Institution of Chartered Surveyors (RICS) where he was responsible for ensuring growth in the EMEA region and led on the organisation's development of global sales, marketing and customer service strategies. Prior to this, Mark was Director of Corporate Development for the ifs School of Finance, responsible for the take-up of its professional qualifications and executive education programmes and before that, Regional Director EMEA for Cohen Brown Management Group.

He started his career with Barclays where he spent 25 years, the latter part as Sales Director and then Chief Operating Officer of Barclays Wealth's International Personal and Premier Banking Division. He holds a BSc (Hons) in Banking and Finance and is a Fellow of the Institute of Directors.

PROFESSOR DR MICHAEL WOHLGEMUTH

Research Officer
Foundation for Economic Governance and Public Law

Michael Wohlgemuth is Research Officer of the Foundation for Economic Governance and Public Law in Liechtenstein. He is also Professor of Political Economy at the private University Witten/Herdecke, Affiliated Fellow at the Walter Eucken Institute, Freiburg, and Tutor at the post-graduate programme 'Social Market Economy' of the Konrad Adenauer Foundation.

Wohlgemuth has an MA in economics from Albert-Ludwigs-Universität, Freiburg, a Ph.D. from Friedrich Schiller University, Jena, and a second Ph.D, from the University of Witten/Herdecke. His major fields of research are in New Institutional Economics, Social and Legal Philosophy and History of Ideas.

CONFERENCE PARTNERS

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INDUSTRIE- UND FINANZKONTOR ETABLISSEMENT was founded in 1948 and is a privately owned, Liechtenstein based trust company with a global focus and a specific tradition and expertise in the long-term and multi-generational preservation of wealth, family values and businesses.

We look back on over 70 years of experience in asset structuring for the purpose of wealth protection and wealth preservation, in many cases over several generations.

The experience necessary to do this comes from our roots.

They are embedded in the House of Liechtenstein whose values have prevailed for centuries and have provided a blueprint for the preservation and passing on of material and intangible wealth from generation to generation - even in times of upheaval.

Our know-how is based on years of working with our clients.

In assisting our clients with the development and implementation of wealth preservation strategies, our areas of services encompass, amongst others:

- Family estate planning and structuring
- Formation and administration of domestic and international legal entities
- Financial reporting and accounting
- Investment controlling
- Development and implementation of family constitutions
- Development and implementation of philanthropic strategies
- Management of non-bankable assets including art, real estate, crypto assets, etc.

All employees of Industrie- und Finanzkontor build an experienced team in various disciplines and have access to an exclusive global network of partners and professional advisors.

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Lenz & Staehelin is the largest law firm in Switzerland, with over 200 lawyers forming its legal staff. Internationally oriented, the firm offers a comprehensive range of services and handles all aspects of international and Swiss law. Languages spoken include English, French, German, Italian, Russian and Spanish. Lenz & Staehelin's tax team is one of the largest among Swiss law firms, with more than 25 tax attorneys offering a full range of tax advice in its three offices in Geneva, Zürich and Lausanne.

Tax practice areas include M&A; restructurings and buyouts; financing; financial products and derivatives; estate and tax planning for executives, including employee share and stock option plans; investment funds; private equity funds; property (acquisition and development); value added tax; internal investigations; and tax litigation.

CONFERENCE PARTNERS

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Stonehage Fleming is one of the world's leading independently owned family offices. We help international families manage their wealth and protect their legacies for generations to come. Stonehage Fleming provides a range of services from long-term strategic planning and investments to day-to-day advice and administration to more than 250 substantial families of wealth. The Group advises on over USD55bn of assets and includes an investment business with c. $13 billion under management for families and charities.

Stonehage Fleming is majority owned by management and staff. The Group employs over 520 people in 11 offices in 8 geographies around the world and is the largest family office in Europe, Middle East and Africa (EMEA).

Stonehage Fleming have three offices in Switzerland: Geneva, Neuchatel and Zurich.

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WealthBriefing is the premier news, features and information source for the global wealth management sector. This subscription-only service provides concise, up-to-the-minute information to leading wealth managers, private bankers, fund and asset managers, family office executives, stockbrokers and other professionals, including private client lawyers, along with high net worth individuals themselves. Whether at your desk or on the move, *WealthBriefing* subscribers receive daily news analysis to their inbox before 8.00 GMT every working day.

WealthBriefing is essential reading for all relationship managers and client-facing professionals in the wealth management sector.

Middle- and back-office professionals will also find it useful as an information centre on companies and trends in the wealth management industry.

For further information please contact: Stephen Harris, CEO, ClearView Financial Media Ltd, publisher of *WealthBriefing*.
+44(0) 207 148 0188 / www.wealthbriefing.com

CONFERENCE ORGANISER

As global conference, event management and marketing communications specialists, The Beehive Partnership's aim is simple: to increase our clients' brand reach and impact with minimum fuss for maximum RoI. With more than 20 years experience in the wealth management market, we liberate senior managers from time-consuming marketing and event/conference development work, enabling them to focus on other business-critical core tasks. Built on its founder's extensive expertise in the sector across North America, Europe, the Middle East and Asia, we deploy a range of skills in pursuit of our goal of adding value to clients' brand leveraging activities. These include:

- Global conference and event management
- Strategic marketing consultancy
- Editorial development (e.g. copy-writing, speech writing, editing and proofing)
- Issues and media management

For further information please contact: Nicholas & Jackie Boole
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CONFERENCE NOTES

“THINK LIKE A WISE MAN BUT COMMUNICATE IN THE LANGUAGE OF THE PEOPLE.”
W.B.Yeats

THE
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PROTECTING, NURTURING AND PROMOTING YOUR BRAND WITH LUCID, CLEAR-EYED MARKET POSITIONING HAS NEVER BEEN MORE IMPORTANT

As marketing and events management specialists The Beehive Partnership has more than 20 years of adding value to clients across the global wealth management industry. Leveraging hard-won reputation for commercial advantage is central to our mission.

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- Event and conference development and delivery
- Strategic marketing advice, development and execution
- Sponsorship identification and acquisition
- Editorial development services
- Speech writing
- Corporate recovery
- Issues and media management
- Communications director mentoring

THE BEEHIVE PARTNERSHIP LTD
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