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STEP Lunch

June 1st, 2021

12:30 - 13:30

Zoom online event

Dear Friends and Members,

The topic of our next event is

2021 Swiss CRS/AEOI guidance notes and their impact on the trust industry

Speaker:

Brandi Caruso, Partner at Deloitte will discuss the 2021 update to the Swiss guidance notes for the Automatic Exchange of Information (AEOI) under the OECD's Common Reporting Standard (CRS). In particular, Brandi will focus on the key changes for the trust industry and the practical considerations for these structures when interacting with Swiss banks. We welcome any questions ahead of the session that you would like addressed. Please submit these [here](#).

BIO

Brandi is a Partner in Deloitte's Tax & Legal business, based in Zurich. Brandi heads Deloitte's Financial Services Tax practice in Switzerland and Liechtenstein. Brandi has extensive expertise in advising the Swiss financial services industry on the implementation of US and international transparency regimes (including QI, FATCA, Section 871(m), CRS/AEOI, MDR and DAC6). Brandi founded and is the host of the Deloitte Trust Forum, featuring representatives from leading Swiss trust companies. Brandi is a US Certified Public Accountant and has twenty years of experience with Deloitte and has worked in London and San Diego before joining the Swiss business in 2008.

Looking forward to see you there

Buy your ticket : [cliquez ici](#)

Best regards

On behalf of the Chairman

Ernesto Wendenburg

STEP Lausanne Secretary

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About STEP

STEP is the worldwide professional association for those advising families across generations.

We promote best practice, professional integrity and education to our members. Our members help families plan for their futures: from drafting a will or advising family businesses, to helping international families and protecting vulnerable family members.



Today we have over 20,000 members across 95 countries. They include lawyers, accountants and other trust and estate specialists.

STEP is established for the following objectives relating to those working in the fields of trusts and estates :

1. To raise the public profile of trust and estate work as a profession in its own right.
2. To provide a forum for individuals drawn from the legal, accountancy, corporate trust and related professions whose occupation includes a significant involvement, at a specialist level, with any of the planning, creation, management of and accounting for, trusts and estates, executorship administration and related taxes.
3. To discuss aspects of tax, accounting, administration, statute and case law which are of general concern.
4. To advance knowledge and learning in respect of trusts, estates and allied subjects and encourage and promote the study of trusts and estate practice and to educate members of the public including practitioners.
5. To organise and hold conferences, meetings and assemblies to provide a forum for the discussion and dissemination of relevant information and data to promote a better understanding of the practical aspects of the foregoing.
6. To undertake research and make suggestions and representations of a technical (strictly non-political) nature to governmental and other persuasive bodies to promote a better understanding of the foregoing and to improve the law relating to and practice of trusts and estates.
7. To maintain requisite standards for practitioners by way of education and training and to organise and hold appropriate examinations and issue qualifications.
8. Generally to participate at local level, by and through both social and technical events organised by branches. In particular, members may meet people engaged in similar work to themselves drawn from different firms and professions, to discuss matters of common interest and to learn how such matters are viewed from different perspectives.

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