

Lexology Webminar

# New Swiss Trust: The Grand Reveal

Andrea Dorjee-Good & David Wallace Wilson

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## **Andrea Dorjee-Good**

Partner, Trust and Estate Practitioner (TEP), Certified Specialist SBA Inheritance Law

Andrea Dorjee-Good is a partner in Schellenberg Wittmer's private wealth group in Zurich. She is a certified specialist in inheritance law and advises private clients on all aspects of estate and succession planning, including pre and post-nuptial agreements, wills, succession pacts, lasting powers of attorney, trusts and foundations. Her practice areas further include contentious estates and she regularly represents clients in complex estate disputes.

Andrea is a member of several professional associations, including the Swiss Bar Association, the Zurich Bar Association, the International Association of Young Lawyers (AIJA) and the Society of Trust and Estate Practitioners (STEP).

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### **David Wallace Wilson**

Partner | Attorney at law, M.C.J. (NYU) Trust & Estate Practitioner (TEP)

David is a Partner with Schellenberg Wittmer's Private Wealth practice. He advises individuals and families on wealth structuring and estate planning for their personal and business assets. He also acts in complex family, guardianship and inheritance disputes, including administering international successions. His additional area of expertise includes anti-money laundering (AML) and art law.

David has served as chairman of STEP Geneva and co-editor of the Trust Quarterly Review. He is also the founder of <u>Trusts.ch</u>.

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Agenda DRAFT

- 1. Introduction
- 2. Where We Stand Today
- 3. Update on Swiss Trustee Licensing
- 4. Roman Roots of the Trust
- 5. Draft Bill for a Swiss Trust Law
- 6. Swiss Taxation of Trusts
- 7. Interplay with Swiss Inheritance Law
- 8. Swiss Trusts in Court & Arbitration
- 9. Practical Uses

