

HYBRID

LUGANO

THURSDAY, 12 JANUARY 2023 | 17:00 - 19:30

Licensing, Regulation and the Evolution of the Swiss Trust Industry

SPEAKERS

Marc Blumenfeld, Managing Director of Alithis AG in Zürich www.alithis.ch

Antoine Amiguet, Partners and Philipp Fischer, Partners, OBERSON ABELS SA in Geneva www.obersonabels.com

Patrick Genazzi, CEO, BRP Bizzozero & Partners SA in Geneva www.brpsa.com

TOPIC

LICENSING, REGULATION AND THE EVOLUTION OF THE SWISS TRUST INDUSTRY

Marc Blumenfeld:

An overview of the recent changes in the regulation of trustees in Switzerland:

- Introduction on the recent changes in the regulation of trustees in Switzerland
- Overview of the licensing/application process and lessons learned from the process
- Practical experience and an overview of "emergency" scenarios
- How the regulation of trustees may impact financial intermediaries in their operation with trustees
- Deadlines for the process

Antoine Amiguet and Philipp Fischer:

The evolution of the Swiss Trust Industry

- what trustees can expect going forward
- overview of the future of prudential trustee supervision
- use of Private Trust Companies & Dedicated Trust Companies
- Challenges for foreign trustees who wish to operate in Switzerland

SPEAKERS CV

MARC BLUMENFELD is the founder of Alithis, a Swiss compliance services provider. He is a Swiss attorney who has over 10 years of experience in the wealth planning, trustee and corporate services business working for independent and bank-owned trustees. As a board member and in-house counsel of different organisations, Marc has also gained relevant experience in the non-profit and sports sector.

ANTOINE AMIGUET is a founder of OBERSON ABELS. He has been advising Swiss and non-Swiss financial institutions (in particular banks, securities houses, insurance companies, collective investment schemes, pension funds, trustees and independent asset managers) on Swiss banking and financial regulations for 20 years. He is a frequent speaker at conferences and seminars. He lectures the legal aspects of sustainable finance in the CAS in Sustainable Finance (HEG-Geneva). He is also a member of the Surveillance & Strategic Committee of Sustainable Finance Geneva, the entity that promotes the Geneva financial centre in the field of sustainable finance.

PHILIPP FISCHER is a founder of OBERSON ABELS. He has been advising Swiss and non-Swiss financial institutions (in particular banks, securities houses, insurance companies, collective investment schemes, trustees and independent asset managers) on Swiss banking, financial and data protection regulations for over 15 years. Philipp Fischer is a member of the Executive Committee (Comité directeur) of the CAS Digital Finance Law (University of Geneva), a post-graduate program dedicated to the legal aspects of the digitalization of the financial industry.

PATRICK GENAZZI began his career after obtaining a Master's Degree in Law, in the Regulatory department of a major audit firm. He then worked for six years in an international bank, where he was in charge of compliance for the Trading and Asset Management department and was responsible for the Group's regulatory projects.

Patrick is the CEO of BRP Bizzozero & Partners SA. He is in charge of the company's Technological development and specialises in the implementation of FinSA and MiFID projects.

He is a member of the Board of BPR Tax SA, a company specialising in cross-border tax issues.

Patrick regularly gives public lectures on current regulatory topics, mainly on cross-border regulation, FinSA, MiFID I and IDD. He is also a member of the SFAA Expert Commission in Wealth Management.

STEP OFFICE Zug

Corinne Graf

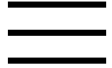
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LEO TRUST
— ZÜRICH SINCE 1980 —

**STEP LUGANO CENTRE
SUPPORTER**

CAPITAL TRUSTEES
Ahead of the game

Date

THURSDAY, 12 JANUARY 2023 | 17:00 - 19:30

Venue

Banca del Ceresio
Via della Posta 7
6901 Lugano
Switzerland
[link to venue](#)

Registration by

WEDNESDAY, 11 JANUARY 2023

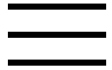
CPD

1 ½ hours towards CPD obligation

Fee

present Members 80.00 CHF
present Non-Members 100.00 CHF
present STEP Students 50.00 CHF
present Sponsors free of charge
on-line Members 40.00 CHF
on-line Non-Members 60.00 CHF
on-line STEP Students 30.00 CHF
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REGISTER NOW



16.55 - 17.00 / Registration

17.00 - 18.30 / Talk & Questions

Link and Presentation will be provided in advance

Timetable on-site

16.45 - 17.00 / Registration

17.00 - 18.30 / Talk & Questions

18.30 - 19.15 / Apéro & Networking

Annulation

Booked places can be cancelled up to 24 hours before the event. Only cancellations made in due time will be refunded. Substitutions may be made at any time.

MORE **STEP** EVENTS

CATEGORY



REGION



MONTH



THURSDAY, 12 JANUARY 2023

Licensing, Regulation and the Evolution of the Swiss Trust Industry

WEDNESDAY, 25 JANUARY 2023

REGULATORY UPDATE

THURSDAY, 26 JANUARY 2023

AML/CFT und Moneyval Assessment – Rückblick, Standortbestimmung und Ausblick

THURSDAY, 09 FEBRUARY 2023

Divorce: Impact for Trusts, Trustees, and Beneficiaries and Top Tips to limit the damage

WEDNESDAY, 29 MARCH 2023

Introduction to Trusts 2023

WEDNESDAY, 03 MAY 2023

Swiss & Liechtenstein STEP Federation ALPINE CONFERENCE 2023

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