

STEP-SATC LAUSANNE CONFERENCE 2015

THE TRUST RE-VISITED – THE HAGUE CONVENTION 30 YEARS AFTER

Programme focus

- The Hague Trust convention – 30 years on
- Trusts & Private Banking
- Swiss Trust Law – is it really needed?
- Trust Litigation in Switzerland
- Recent Jurisprudence
- Special Dynamics of Family Businesses in trust
- The Swiss Institute of Comparative Law Assistance
- International Trust Litigation
- Trusts and Arbitration – Recent Developments
- Criminal Implications in Trust Litigation
- Trusts and Swiss Real Estate

PLUS...

Round table debate –
The Future of Trust Business in
Switzerland: Challenges and
Opportunities

Accredited for 6 hours CPD – STEP
Conference language: English

DELEGATE FEE	
STEP & SATC Members	495CHF
Non-Members	550CHF

Sponsors include



Gold



Silver



Bronze



STEP-SATC LAUSANNE CONFERENCE 2015

THE TRUST RE-VISITED – THE HAGUE CONVENTION 30 YEARS AFTER

Why attend this conference?

The Swiss SATC/STEP Conference, “The trust Re-Visited”, will consider how in thirty years since the conclusion of the Hague Trust Convention the trust has become more widely accepted and trust service providers have greater opportunities, in many countries, including Switzerland. The speakers will demonstrate how the trust is playing a full and positive role in the world of wealth management and fiduciary services in Switzerland, as well as cover recent international trust law developments and jurisprudence.

The ambitious program features distinguished speakers from the judiciary, academia, the Swiss government, regulatory and the financial services world and promises to be an extraordinary conference. We hope you will be able to join us!

Bonnie Steiner Jur.Dr LLM TEP
For the Committee, STEP Lausanne

ABOUT THE ORGANISERS

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.

SATC is a Swiss professional association which aims to strengthen the standing and reputation of the trust industry in Switzerland and to ensure a high level of quality, professionalism and integrity within the industry. SATC also provides a platform for its members to exchange information and know-how on trust-related matters. It is now recognized by the Swiss federal authorities as their interlocutor of choice for all matters which are relevant to the trust industry.

Sponsors
include



Gold



Silver



Bronze



Register today using the enclosed registration form

Conference programme

TUESDAY 3 NOVEMBER 2015

8:15 - 8:55	Registration – coffee
8:55 - 9:00	Introduction
	<i>Stéphane Lagonico TEP, Partner – Bonnard Lawson, Lausanne</i>
9:00	Reflections on the Hague Trusts Convention After Thirty Years
	<i>Hon. Mr. Justice David Hayton, LLD Caribbean Court of Justice</i>
9:50	Trust Litigation in Switzerland: The Perspective of the Civil Law Practitioner
	<i>Tina Wüstemann Bär & Karrer, Zurich</i>
10:30 - 10:45	Coffee Break
10:50	Toward a Swiss Trust Law: Pondering Models
	<i>Professor Luc Thévenoz Geneva University, Faculty of Law</i>
11:35	Trust Law in Switzerland: The Role and Resources of the Swiss Institute of Comparative Law
	<i>Martin Sychold The Swiss Institute of Comparative Law Lukas Heckendorn Urscheler The Swiss Institute of Comparative Law</i>
12:00 - 13:30	Lunch
13.00	Lunchtime Speaker Swiss Association of Trust Companies (SATC) Update
	<i>Alexandre von Heeren TEP, President of SATC</i> Current matters relating to the Swiss Association of Trust Companies (SATC) and the regulation of trustees and financial intermediaries in Switzerland.

13:35	Civil (Swiss) V. Common Law Perspectives on Trusts and the Dangers of Criminal Law in Trust Litigation
	<i>Professor Carlo Lombardini PTAN & Associés, Geneva Ian Meakin XXIV Old Buildings, Geneva</i>
14:40	The Importance of Trusts in a Transparent World from a Private Bankers Perspective
	<i>Mme Anne-Marie de Weck Lombard Odier & Cie SA, Geneva</i>
15:20 - 15:45	Coffee Break
15:45	Trustee Challenges: Dealing with the Qualitative Side of Family Wealth and the Special Dynamics of Family Businesses in Trust
	<i>Christian Stewart Family Legacy Asia, Hong Kong</i>
16:25	Trusts and Swiss Real Estate: The Theory and the Practice
	<i>Dr Thomas Mayer Swiss Federal Office of Justice</i>
16:45	Round Table Debate - The Future of Trust Business in Switzerland: Challenges and Opportunities
	<i>Moderator - Stéphane Lagonico</i> <i>Panel:</i> <i>George Hodgson Richard Pease Xavier Isaac David Wilson</i>
17:30 - 18:30	Cocktail Reception

Speakers' Biographies



Richard Pease, TEP

Richard Pease is an English solicitor and is an independent consultant based in Geneva where he advises on international tax and estate planning. He is a Vice President of STEP, having served as Worldwide Chairman in 2006-2007.



Alexandre von Heeren

Alexandre von Heeren is a co-owner of Mandaris and has been with the company since 1998. He serves as its managing partner. After several years in executive positions in the legal and trust departments of major banks, Alexandre joined Mandaris in 1998. He is the current chairman of the Swiss Association of Trust companies SATC



George Hodgson

George Hodgson is Deputy Chief Executive at STEP the worldwide professional body for those specialising in advising families across generations. Prior to joining STEP, he held a senior policy position at the Association of British Insurers, the main insurance industry trade body in the UK and has also served on the staff of the Treasury Committee of the UK House of Commons.



Martin Sychold

Studied in Adelaide, Australia, Vienna and Austria and is admitted to attorney practice in the State of New York. He is responsible at the Swiss Institute of Comparative Law for all Anglo-American, mixed or transitional legal orders and opinions. He has 25 years' experience applying English law in Switzerland.



Xavier Isaac

Originally from Belgium Xavier Isaac gained over 20 years of experience in management positions. He is currently Head of Trust & Fiduciary of Salamanca Group supported by a multi-jurisdictional management team and as such he is a principal driver of the Trust and Fiduciary vision and strategy. Xavier is also a member of SATC and STEP.



Lukas Heckendorn-Urscheler

Vice-Director of the Swiss Institute of Comparative Law (since 2009), Studied in Fribourg and Paris, PhD University of Fribourg, Practical experience at different law offices in Switzerland and Spain, research in Sweden, Germany, and Nepal.



Christian Stewart, LLB, TEP,

Christian Stewart, LLB, TEP, is the founder of Family Legacy Asia (HK) Limited, which is a process consulting firm. Christian works with enterprising families around Asia helping them to form their own family council, family constitution and family policies. He is the author of the chapter on Family Offices in Hong Kong in the book "Family Offices: The STEP Handbook for Advisors" published by Globe Business Publishing Limited.



David Wilson, TEP

David Wallace Wilson is a partner at Schellenberg Wittmer's Private Clients and Estates practice in Geneva. He advises individuals and families on all aspects of wealth structures and tax planning for their personal and business assets. He currently serves as STEP Geneva Chairman.

Speakers' Biographies



Justice Hayton LLD, TEP (Hon)

The Honourable Justice Hayton is a judge of the Caribbean Court of Justice. When a Fellow of Jesus College Cambridge he headed the UK Delegation for the Hague Trusts Convention and was on the drafting committee.



Anne-Marie de Weck

Managing Partner of the Lombard Odier Group since 2002, Anne-Marie joined Lombard Odier in 1997 as Head of the Legal and Tax Department and subsequently of the Private Clients. Since 1 January 2015, she is Vice-Chairman of the Board of Directors of Bank Lombard Odier & Co Ltd. Before joining Lombard Odier, she was a Partner and Vice-President of KPMG Switzerland.



Tina Wüstemann, LLM

Tina Wüstemann heads Bär & Karrer's private client team. She advises Swiss and foreign private clients, executives as well as entrepreneurs regarding complex multi-jurisdictional estate and wealth planning matters including trusts, prenuptial agreements and wills. She also advises charitable foundations and is involved in litigious trust and estate cases as well as the administration of large international estates.



Dr. Thomas Meyer

Dr Thomas Mayer studied law at the University of Basel, where he obtained his doctorate with a dissertation on trusts in Swiss International Private Law. Dr Mayer has been with the Department of International Private Law of the Swiss Federal Department of Justice since 2002, where he has been responsible amongst others for the legislative project relating to the ratification of the Hague Convention on Trusts.



Professor Luc Thévenoz

Luc Thévenoz, an honorary member of STEP, is a professor of law at the University of Geneva and the director of its Centre for Banking and Financial Law. He is also the chairman of the Swiss Takeover Panel and a member of the board of Mirabaud & Cie SA.



Carlo Lombardini

Carlo Lombardini is a partner of Poncet Turrettini Amaudruz Neyroud & Partners in Geneva. He teaches banking law at the Law Faculty of the University of Lausanne as a Professor. He is the chairman of the audit and risk committee of one of the leading foreign banks active in Switzerland and a member of the arbitration panel of the Swiss Association of Asset Managers.



Ian Meakin, TEP

Ian Meakin is an English Barrister and a tenant at XXIV old Buildings. He is based primarily in Geneva and is a registered trust and estate practitioner and specializes in trust litigation.



Stéphane Lagonico, LLM, TEP

Stéphane Lagonico is a Swiss attorney and member of the Bar active in private client services. He advises private individuals, families, trustees, family offices and charitable organizations on personal status, estate, banking and tax matters. He is the founding and honorary chair of STEP Lausanne and a Board member of several non-for profit organizations.

STEP-SATC LAUSANNE CONFERENCE 2015

THE TRUST RE-VISITED – THE HAGUE CONVENTION 30 YEARS AFTER

Delegate registration form

Please email the completed registration form to sophie.deslage@swissinterim.ch or fax to + 41 (0) 22 770 50 61

Registration & Payment

To register please complete the form below and send payment via bank transfer. Please email the completed form to sophie.deslage@swissinterim.ch or send by fax to + 41 (0) 22 770 50 61

Bank transfer Details:

To Credit Suisse S.A., Lausanne, for credit to Association STEP Lausanne
Account: 0425-1430585-91
IBAN: CH72 0483 5143 0585 9100 0
Swift address: CRESCHZZ10A /Clearing: 4835

Please state registrants name on the payment instruction.

Title: First Name:

Surname: _____

Firm: _____

Department: _____

Job Title: _____

Postal Address: _____

Country: _____

Tel No: _____

Email: _____

Access/Dietary Requirements: _____

PLEASE NOTE: We may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event

Event Information

Date: Tuesday 3rd November 2015

Venue: Lausanne Palace
Rue du Grand-Chêne 7
1003 Lausanne
Switzerland

Conference Delegate Rates

Please tick corresponding box.

STEP & SATC Members CHF 495

Non-Member CHF 550

STEP Membership number _____

Cancellations/Substitutions

Cancellations must be received in writing to sophie.deslage@swissinterim.ch at least ten days before the date of the conference and will be subject to an administration charge of CHF 75. Please ensure your notification includes all relevant information regarding the bank account to which a possible refund may be remitted. It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full conference fee. Substitutions may be made at any time provided the organisers are notified prior to the conference. Please note that if a non-STEP member attends in lieu of a STEP member the difference in fees will be charged before entry will be permitted.

Terms and Conditions

Conference documentation will be distributed at the event. STEP/SATC reserves the right to amend or cancel this conference where the occasion necessitates. In the event of cancellation a full refund of any registration fee will be made but STEP/SATC shall accept no further liability. Prices may be subject to change. This booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of the fees due.

The conference language is in English.

Data Protection

The Society of Trust & Estate Practitioners will use this information to update its databases, which will be used to provide details of STEP products and services. Please tick the box if you would prefer the Society not to use your information in this way. STEP may also contact you from time to time with details of programmes and events that may be of interest to you. Please tick the box if you would prefer the Society not to use your information in this way.

For general enquiries please contact Bonnie Steiner at bonnie.steiner@stonehage.com
For payment enquiries please contact Sophie Deslage at sophie.deslage@swissinterim.ch