



Lausanne

ADVISING FAMILIES ACROSS GENERATIONS

2017: What does the OECD's automatic exchange of information system mean for trustees and fiduciaries in Switzerland?

STEP LUNCH MEETING / Lausanne

SPEAKER

Matthew Shayle

DATE

Tuesday, 12th of May 2015

TIME

	12.00 – 14.00 hrs.
Registration	12.00 – 12.15 hrs.
Talk and Questions	12.15 – 13.00 hrs.
Lunch and Coffee	12.30 – 14.00 hrs.

VENUE

Lausanne Palace Hotel
Rue du Grand-Chêne 7-9
1002 Lausanne

SUPPORTED BY

Kendris SA,
Stonhage SA
Swiss Interim TTF SA



REGISTRATION

by e-mail to

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or by fax: +41 21 925 50 01

CPD

1 structured CPD hour.

FEE

	CHF (incl.VAT 8 %)
Members	50.00
Non-Members	60.00

CONDITIONS

Reserved places will be charged, unless cancelled 48 hours before the event.

Yours sincerely,
STEP Office
Lausanne

Antonia van
Saanen
Event Officer

Guillaume
Grisel
Chairman



Lausanne

ADVISING FAMILIES ACROSS GENERATIONS

Lausanne Palace Hotel / Tuesday 12th of May 2015 / 12.00 hrs.

SPEAKER

Matthew Shayle

Matthew specializes in tax-focused wealth management for high net-worth clients, and gives assistance to clients with international interests in respect of asset protection and ownership structuring matters. He advises on matters relating to complex international structures, including their establishment for succession and estate planning, asset consolidation and personal tax mitigation.

TOPIC

"2017: What does the OECD's automatic exchange of information system mean for trustees and fiduciaries in Switzerland?"

The OECD's Common Reporting Standard is due to be implemented into Swiss domestic law with effect from the start of 2017, so that information gathered from affected Swiss intermediaries will be exchanged for the first time in 2018. The consultation processes are well underway and draft domestic legislation already exists. With the rapid approach of seemingly fully-transparent global private wealth industry, and memories of the implementation processes required by FATCA still very fresh in memories, what will the OECD's Automatic Exchange of Information model mean for Swiss professionals in the sector?



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RESERVATION

Please note you will not receive any confirmation of your registration

Name

Tel.n°

Email address

Company

Name of additional guest(s)

Doors open at 12:00, and presentation commences at 12:15 prompt.

CONFIRMATION OF PAYMENT

My payment of CHF is made as follows:

- By bank transfer 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 make sure that your name(s) be mentioned by your bank!
I will pay in cash at the door.

As we are liable for all reservations made, "No shows" will be required to pay. All attendees whose payment has not been confirmed 24 hours preceding the luncheon will be required to pay at the door. Cancellations in writing must be received by the Secretariat 24 hours before the event. Any payments received thereafter will be held on credit for future events. Thank you for your understanding.

Your signature :

Please return this form, duly completed and signed, to us:

By email: to Antonia van Saanen, Event Officer of STEP Lausanne antonia.vansaanen@swissinterim.ch

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