

STEP Half-Day Conferences

Thursday
4 December
2014



Contentious Trusts and Estates Special Interest Group

STEP Offices, George Tasker Suite (7th Floor), Artillery House South, 11-19 Artillery Row, London SW1P 1RT, United Kingdom

CONFERENCE

Case Update from Leading Trust Jurisdictions

EVENT FOCUS

The aims of the Contentious Trusts and Estates Special Interest Group include providing a forum for sharing international trust and estate jurisprudence and marshalling expertise and best practice in dealing with trust and estate disputes.

The Group's annual London conference will include speakers from Switzerland, the Channels Islands and England & Wales, covering a wide range of cases and developments.

WHY ATTEND?

Trust and estate lawyers and administrators will learn of the latest developments in contentious trusts and estates, with opportunity to raise questions of their own. The conference will be followed by the Special Interest Group's annual general meeting where the group will share exciting news of their new global forum, and a networking drinks reception.

1.30pm – 2.00pm

Arrival, Registration and Tea/Coffee

2.00pm – 2.05pm

Chairman's Welcome Address and Introduction

Toby Graham TEP, Partner, Farrer & Co

2.05pm – 2.35pm

Trusts and jurisdiction – *Crociani v Crociani*

Nicholas Le Poidevin QC TEP, New Square Chambers – UK

2.35pm – 3.05pm

Update on Swiss court decisions concerning trusts

David Wallace Wilson TEP, Partner – Private Client, Schellenberg Wittmer Ltd – Switzerland

3.05pm – 3.35pm

Statutory provisions seek to limit trustees liability: Guernsey Court of Appeal decision in *Investec Trust v Glenalla Properties Ltd*

Jonathan Speck TEP, Partner, Mourant Ozannes – Jersey

3.35pm – 4.00pm

Refreshment Break

4.00pm – 4.30pm

Bribes and Secret Commissions: Supreme Court decision in *FHR European Ventures LLP v Cedar Capital Partners LLC*

Toby Graham TEP, Partner, Farrer & Co – UK

4.30pm – 5.00pm

Trusts and divorce: the latest from Jersey *Re Poon Family Trust* and *Re the Unity Trust*

Robert MacRae, Partner, Carey Olsen – Jersey

5.00pm – 5.20pm

Questions & Answers

5.20pm – 5.25pm

Chairman's Closing Remarks

Toby Graham TEP, Partner, Farrer & Co

5.30pm – 6.00pm

Contentious Trusts and Estates Special Interest Group Annual General Meeting

6.00pm – 7.30pm

Networking Drinks Reception

Delegate Fee

Contentious Trusts and Estates SIG Member £80

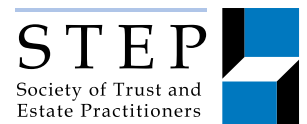
STEP Members £95

Non-members £115

Accredited for 3 hours

STEP, SRA and BSB CPD

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Registration Information



Register online today at www.step.org/half-day-conferences

Annual General Meeting 2014 of the Contentious Trusts and Estates Special Interest Group

Following their conference, the Contentious Trusts and Estates Special Interest Group will also hold their annual general meeting which will be open for attendance by members of the special interest group, the group's steering committee, and any other interested persons. Discussion will focus on plans for the year ahead and inform you of the group's new global forum and other activities. It will also be an opportunity to input into the group's planned 2015 activities. If you plan on attending, simply indicate this when registering for the conference.

Payment

EVENT CODE: 5383

Delegate Rates

Contentious Trusts and Estates SIG Member £80
STEP Members: £95
Non-members: £115

PLEASE REGISTER ONLINE AT WWW.STEP.ORG/HALF-DAY-CONFERENCES

YOU WILL BE ABLE TO SELECT FROM THE FOLLOWING PAYMENT OPTIONS UPON REGISTERING:

Credit Card

Payment by credit card is by Visa & Mastercard only.

Cheques

Cheques crossed and made payable to STEP Conferences, quoting your invoice number on the reverse and sent to: STEP, Artillery House (South), 11-19 Artillery Row, London SW1P 1RT, United Kingdom

Bank Transfer

Please transfer funds quoting your invoice number to:

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Bank a/c no: 30442585
IBAN: GB48 BARC 2003 5330 4425 85
Swift code: BARCGB22

SEND YOUR REMITTANCE ADVICE TO ACCOUNTS@STEP.ORG

Terms and Conditions

Registration Fee

The event registration fee includes participation in the conference, refreshments and documentation material. All bookings are considered binding on completion of the registration form.

Cancellations

Cancellations must be received in writing at least seven days before the date of the conference and will be subject to an administration charge of £30.00. It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full event 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, or a non-member or STEP Member attends in lieu of a SIG Member, then the difference in fees will be charged.

Event Documentation

Please note that in order to reduce the environmental impact of the event, event documentation may be provided electronically, rather than in printed copy. If this is the case, registrants will be provided with the details to access this.

If you are unable to attend the event and would like to purchase an electronic copy of the event documentation, you can do so by emailing orders@step.org. A charge of £25.00 will apply. Electronic copy is sent after payment has been received. Event documentation contains notes from those speakers who provide them.

Accreditation

The event is accredited for 3 hours structured training under the CPD/CPE schemes as follows, subject to the appropriate claim being made by the delegate: Society of Trust and Estate Practitioners (STEP), The Solicitors Regulation Authority (SRA), Bar Standards Board (BSB).

Disclaimer

It may be necessary for reasons beyond control of the event organisers to alter the content and timing of the programme or the identity of the speakers.

Society of Trust and Estate Practitioners

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