

Transcontinental Trusts Bermuda

Digital Conference Programme
1st to 4th June 2021

Day 1

11.00 Chair's Welcome Address

Jon Conder, Partner, *Macfarlanes*
Basil Zirinis, Partner, *Sullivan & Cromwell*

11.10 **The Changing Landscape for Trusts and Trustees**

Clare Maurice, Senior Partner, **Maurice Turnor Gardner**

Breakout sessions

Stream 1 Jurisdiction Developments	Stream 2 Non-contentious Structuring	Stream 3 Contentious Issues
11.40 UK	A Crucial Time for Succession Planning: Diversification of Families Beatrice Puoti Partner, Head of Private Wealth <i>Burges Salmon</i>	Capacity Tina Wuestemann , Partner, <i>Bär & Karrer AG</i>
12.10 US Sasha Grinberg Associate, <i>Cadwalader</i> Jay Rosenbaum , Partner, <i>Nixon Peabody</i>	What constitutes a family? Working with non-traditional family structures	Preparing for divorce – role of trustees – pre, during and post

12.40 **Global Dispute and Litigation Update**

Jonathan Hillard QC, Barrister, **Wilberforce Chambers**
Gemma Willingham, Partner, **Baker McKenzie**

13.10 Close of Day 1

13.15 **Welcome Drinks Reception at TT Bermuda's Beachfront Bar**

Connect with speakers and fellow delegates at our fully immersive and 3D networking experience.

Day 2

11.00 Chair's Welcome Address

11.05 **Next Gen, Succession Planning, Sustainability & Family Governance: A Paradigm Shift?**

Georgina James, Partner, *Farrer & Co*

Nicholas Jacob, Partner, *Forsters*

Breakout sessions

Stream 1 Jurisdiction Developments	Stream 2 Non-contentious Structuring	Stream 3 Contentious Issues
11.35 Africa	Succession structuring Trusts and Foundations: Exploring Alternative Structuring Uses Amy Staehr Partner <i>Long Reimer Winegar</i>	Deeper dive into/Further examination of selected offshore trust judgments Eason Rajah QC , Barrister, <i>10 Old Square Chambers</i>
12.05 Middle East	Investment structuring including family funds; LLC/FICs; partnerships Stan Barg , Partner, <i>Kozusko Harris Duncan</i>	Enforcement of judgements across borders

12.35 **When trusts are no longer useful/fit for purpose – blessings/variation of trusts**

Nicholas Le Poidevin QC, Barrister, *New Square Chambers*

13.05 Close of Day 2

13.15 **Networking Reception at TT Bermuda's Beachfront Bar**

Return to our 3D beachfront bar and catch-up with attendees in group or one-to-one video calls

Day 3

11.00 Chair's Welcome Address

11.05 **Reaction to the Pandemic 1: Tax changes upwards or downwards to finance the Pandemic and mitigation strategies**

Sonia Velasco, Partner, **Cuatrecasas**

Breakout sessions

Stream 1 Jurisdiction Developments	Stream 2 Investments	Stream 3 International Initiatives
11.35 Bermuda and Cayman Islands	Real Estate Investment and Property Trends Piers Master , Partner, Charles Russell Speechlys	Information requests from tax authorities to trustees Nicole Buncher , Partner, Clifford Chance David Wilson Partner, Schellenberg Wittmer
12.05 Latin America Nicole Najjar , Partner, Mattos Filho	Digital Assets Chris Duncan , Counsel, Carey Olsen	Matrimonial Regimes

12.35 **How is ESG affecting clients and our work?**

Isobel Morton, Partner, **Macfarlanes**

13.05 Close of Day 3

Day 4

11.00 Chair's Welcome Address

11.05 **Reaction to the Pandemic 2: Mitigating risk - Personal - including considering alternative jurisdictions**

Alex Carruthers, Partner, **Hughes Fowler Carruthers**

Stream 1 Jurisdiction Developments	Stream 2 Investments	Stream 3 Regulatory
11.35 Bahamas and BVI	Coping with Volatility; margin calls; settlor control issues	Succession Regimes EU Directive Richard Frimston , Consultant Russell Cooke

12.05 Asia

Owning “toys” boats,
planes, art, cars in
structures

Bachir Karam,
Partner,
Sullivan & Cromwell

Impact of regulation,
Economic Substance,
Beneficial Owner Registers,
FATCA, CRS across
jurisdictions

Dina Kapur Sanna,
Partner,
Day Pitney LLP

12.35 **Lessons learned for ourselves and our clients from the last 12 months. What are we going to keep and what are we going to lose?**

Line-Alexa Glotin, Partner, *UGCC Avocats*

13.05 Close of Day 4

13.15 **Farewell Reception at TT Bermuda’s Beachfront Bar**