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Members advice clients on the broad business management of personal finance. Full members of STEP are the most experienced and senior practitioners in the field of trusts and estates.

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Managing and protecting assets of clients from emerging regions

The challenges facing trustees today are myriad. While the topics may be perennial, the globalization of investments and multiple nationalities and residences of families have increased the burden on trustees.

Dealing with clients from major emerging regions

Understanding the source of power and wealth of clients from emerging regions: these are just some of the issues that trustees and advisors face with clients from Africa, Asia, the Middle East and India.

Tax and estate planning strategies for the assets of private clients

How wealth is held and the tax and non-tax issues surrounding such holdings pose many challenges for banks and their advisors. They will be critical for the management of assets in emerging regions or in relation to the assets and related obligations issued for trust, banks and insurance companies.

10:15 - 10:45

Coffee break

10:45 - 11:00

Dealing with clients from major emerging regions

Understanding the source of power and wealth of clients from emerging regions: these are just some of the issues that trustees and advisors face with clients from Africa, Asia, the Middle East and India.

11:00 - 11:30

Family governance and succession of clients from major emerging regions

Overview of family governance and the trustee's role in implementing family governance structures, including cross-departmental planning.

11:30 - 12:15

Managing and protecting assets of clients from emerging regions

The challenges facing trustees today are myriad. While the topics may be perennial, the globalization of investments and multiple nationalities and residences of families have increased the burden on trustees.

Coffee break

12:15 - 13:45

Lunch

13:45 - 14:30

Dealing with private clients – issues for trustees

The challenges facing trustees today are myriad. While the topics may be perennial, the globalization of investments and multiple nationalities and residences of families have increased the burden on trustees.

14:30 - 15:15

Tax and estate planning strategies for the assets of private clients

How wealth is held and the tax and non-tax issues surrounding such holdings pose many challenges for banks and their advisors. They will be critical for the management of assets in emerging regions or in relation to the assets and related obligations issued for trust, banks and insurance companies.

15:15 - 15:45

Exit Strategies for European private clients

A getting up and going it good solution? Registration of assets and tax planning.

Coffee break

15:45 - 16:30

Panel discussion – working in a transparent world

WBCA in Switzerland – an update / reporting duties for trustees under FATCA; Worldwide automatic and spontaneous information exchange – an update; Closing remarks.

16:30 - 17:45

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17:45 - 19:00

Cocktail Reception

Organisers

Presenting sponsor

Coffee break sponsors

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