STEP Global Congress
6-7 November 2014
Mandarin Oriental Hotel, Miami, USA

A world-class technical programme, giving you the opportunity to network and exchange ideas with practitioners from STEP’s global community

Plus...
Specialised sessions from our SIGs (Special Interest Groups) who play a major part in this programme

Focussed SIG themes include:

- Decision making and risk in private wealth
- Harmony and dis-harmony of private international law
- Supranational initiatives
- Asset recovery and litigation
- Trusts in civil law jurisdictions
- Digital assets – coping with death and incapacity
- Complex tax structures

And so much more, see inside for full details.

Keynote Speakers:
Geoffrey Robertson QC, Doughty Street Chambers, UK
John G. Taft, CEO, RBC Wealth Management, USA

Early bird rate*

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<th>Early bird rate</th>
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<tr>
<td>STEP Members</td>
<td>$1,800</td>
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*early bird rate applies until 30 June 2014

Sponsors include

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Conference language: English

www.stepglobalcongress.org
The STEP Global Congress is more than just a conference. Find out more about our exciting social events at www.stepglobalcongress.org
Option 4 – Cross-Border Estates Special Interest Group: The international family – The impact of the European Succession Regulation (Brussels IV) inside and outside Europe
Richard Frimston TEP, Russell-Cooke LLP, UK

Option 5 – Contentious Trusts and Estates Special Interest Group: The client’s perspective on trust and estate litigation
Chair: Toby Graham TEP, Farrer & Co, UK
Dr Hubert Achermann, Lunag AG, Switzerland
Dr Georgia Fotiou TEP, KPMG AG, Switzerland

Option 6 – International Faculty: Government use of data
Chair: Richard Hay TEP, Stikeman Elliott LLP, UK
Geoff Cook TEP, Jersey Finance Limited, Jersey
Nick Jacob TEP, Lawrence Graham LLP, UK
Mark Matthews, Caplin & Drysdale, USA

2.50pm Main Stage Session 2
The harmony and dis-harmony of private international law
Chair: Professor Donovan Waters QC TEP, Home Coupar, Canada
Professor Jonathan Harris TEP, Serle Court Chambers, UK
Professor Jeffrey Schoenblum, Vanderbilt University, USA

3.50pm Networking and refreshments

4.20pm Main Stage Session 3
Supranational initiatives:
• The G8 and G20 agendas
• Transparency and beneficial ownership
• Unacceptable tax avoidance
• Automatic exchange of information
• What it all means for the wealth management industry
Monica Bhatia, OECD, France
John Riches TEP, RMW Law LLP, UK

5.20pm Day 1 closing address

6.00pm Reception and dinner
Join us for drinks and a BBQ dinner in a relaxed setting with a Miami vibe.

Register online today at www.stepglobalcongress.org
### Main Stage Session 5

**STEP’s response to the emerging transparency agenda**
Balancing the needs of the clients and the Society
George Hodgson, STEP Worldwide

### Networking and refreshments

### Special Interest Group Sessions

**Option 1 – Business Families Special Interest Group: Harvard Business School meets Confucius – the family dimension**
Mary Duke TEP, Family Wealth Advisor, USA
Nicolas Malumian TEP, Malumian & Fossati, Argentina
Paul Stibbard TEP, Rothschild Trust, UK

**Option 2 – Mental Capacity & Cross-Border Estates Special Interest Groups: Multi-jurisdictional assets – challenges for estate planning and dealing with mental incapacity**
Margaret O’Sullivan TEP, O’Sullivan Estate Lawyers, Canada
Joshua Rubenstein TEP, Katten Muchin Rosenman LLP, USA

**Option 3 – Philanthropy Advisors Special Interest Group: Philanthropy in the global village**
Betsy Brill TEP, Strategic Philanthropy Ltd, USA
Clive Cuthill TEP, Withers LLP, UK

**Option 4 – Contentious Trusts and Estates Special Interest Group: Trustee investment – what the common-law world can learn from Uncle Sam**
Nicholas Le Poidevin QC TEP, New Square Chambers, UK
Basil Zirinis TEP, Sullivan & Cromwell LLP, USA

**Option 5 – International Faculty: Finance centres 2020 – how will service provider business models evolve to cope with transparency?**
Richard Hay TEP, Stikeman Elliott LLP, UK
Geoff Cook TEP, Jersey Finance Limited, Jersey
John Riches TEP, RMW Law LLP, UK

### Lunch

### Specialist Sessions

**Option 1 – US/Canadian tax developments: Discussion of the issues and opportunities for planning involving cross-border US/Canada families**
Joseph Kellogg TEP, WE Family Offices, USA
Kim G C Moody TEP, Moodys Gartner Tax Law LLP, Canada
Michael Pfeifer TEP, Caplin & Drysdale Attorneys, USA

### Main Stage Session 6

**Are you on the endangered species list?**
Challenging old-guard thinking
- The long-term demographic of the client base
- The need for client centricity and trust; do we have it today?
- The millennial generation – the next generation of clients: their take on us

Aron Pervin TEP, Pervin Family Business Advisors Inc, Canada
Bruce Weatherill, Bruce Weatherill Executive Consulting Limited, UK

### Networking and refreshments

### Main Stage Session 7

**The great debate**
Interactive session including live polling/voting

### Conference close

### Farewell beach party
End your Congress experience on the private white-sand beach of the Mandarin Oriental, overlooking Biscayne Bay. Grab a drink, kick off your shoes and get ready for a fun evening of music, great food and flowing drinks!
The inaugural STEP Congress brings together all those interested in the world of family inheritance and succession planning, from all over the globe. Attendees will include thought-leaders and industry experts, made up of both STEP members and non-members. With a world-class technical programme and the opportunity to network and exchange ideas, this is an event not to be missed!

The powerful, thought-provoking agenda encourages the exchange of ideas, knowledge and learning. The different programme streams range from the highly topical, international subject areas, to specialised sessions from our Special Interest Groups, so you can build your agenda around the areas that interest you.

The excellent social events also offer attendees the time to network with peers and partner organisations, providing extensive business opportunities. Speakers will not just be drawn from practitioners but will include prominent external commentators sharing ideas, criticism, business insight and new analysis about our world.

We look forward to welcoming you to what is sure to be an outstanding two days of learning, sharing and networking.

David Harvey, CEO, STEP

Conference Sponsors

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To find out more about sponsorship opportunities with STEP contact Tom Fountain – tom.fountain@thinkpublishing.co.uk

Register online today at www.stepglobalcongress.org
Keynote Speakers’ Biographies
This conference features more than 40 renowned international speakers, with keynote sessions from:

Geoffrey Robertson QC, Doughty Street Chambers, UK
Geoffrey Robertson QC is founder and head of Doughty Street Chambers, one of Europe’s largest human rights practices. He has had a distinguished career as a trial and appellate counsel, and has served as a UN Appeals Judge and as a ‘distinguished jurist’ member of the UN’s Justice Council. He has argued many landmark cases in media, constitutional and criminal law in the European Courts of Justice and of Human Rights, in the Privy Council and the Supreme Courts of the UK and of many Commonwealth countries. He has been involved in the prosecutions of General Pinochet and Hastings Banda and the defence of Salman Rushdie, Mike Tyson and Julian Assange. He was counsel for the trustees in the notable case of Bacardi & de Juria v Patron Tequila which after numerous visits to the Privy Council from Anguilla resulted in a $550 million settlement in favour of his clients.

John G. Taft, RBC Wealth Management, USA
John G. Taft is CEO of RBC Wealth Management. He served as chairman-elect for the Securities Industry and Financial Markets Association (SIFMA) in 2010 and chairman in 2011. As a representative of SIFMA, John advocated for responsible financial reform and testified before Congress in support of a federal fiduciary standard of care for investment professionals who provide advice to individual clients. An active diversity advocate around issues of gender identity, John serves as executive sponsor for RBC WM – U.S.’s Gay, Lesbian, Allied and Diverse Employees (GLADE) employee resource group. Under his leadership, RBC WM – U.S. received a 100 per cent rating in the Human Rights Campaign’s Corporate Equality Index. In 2010, the National Gay & Lesbian Chamber of Commerce (NGLCC) named John the ‘Outstanding Corporate Diversity Leader.’

To view all of the speakers’ biographies, please visit www.stepglobalcongress.org

About the Organisers
STEP is the worldwide professional association for practitioners dealing with family inheritance and succession planning. The Society helps to improve public understanding of the issues families face in this area and promotes education and high professional standards among its members. STEP has 19,000 members across 80 jurisdictions from a broad range of professional backgrounds, including lawyers, accountants, trust specialists and other practitioners in this area. STEP members help families plan for their futures, specialising in a wide range of activities, from drafting a relatively simple will to more complex issues surrounding international families, protection of the vulnerable, family businesses and philanthropic giving.

For more information about STEP, visit www.step.org or email step@step.org

For any queries please contact the conference team on +44 (0)20 7340 0500 or email conferences@step.org

For the detailed conference programme and to register to attend, visit www.stepglobalcongress.org

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