Leading international trust experts and distinguished speakers include:

- The Honourable Mr Justice David Hayton
  THE CARIBBEAN COURT OF JUSTICE

- Dan Mitchell
  Senior Fellow
  CATO INSTITUTE

- Jolyon Maugham QC
  Barrister
  DEVEREUX CHAMBERS

- Geoff Cook
  CEO
  JERSEY FINANCE

- Professor Jason Sharman
  GRIFFITH UNIVERSITY

- Sir Michael Birt
  Former BAILIFF OF JERSEY

- Dr. Charles Poncet
  Partner
  CMS LAW

- Richard Hay
  Partner
  STIKEMAN ELLIOTT

16th-18th June 2015
Grand Kempinski Hotel, Geneva
**PROGRAMMES AT A GLANCE**

### International Trust Litigation

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### Transcontinental Trusts Day 1

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**WHAT’S NEW FOR 2015**

Brand new hot topics and focus areas including:
- Sail boat cruise & gala dinner at Swiss National Museum
- Future of tax enforcement
- Information exchange
- Disclosure from beneficiaries
- What is wilful default
- Interaction of jurisdictions

**BREAKFAST BRIEFINGS WITH THE EXPERTS**

- Trust Law & Structuring
- Latin America
- Specification of a Trustee in the New Landscape
- Family Governance – The Soft and the Hard Issues
- Jurisdiction Hopping: Planning & Litigation
- Cross Border Planning for Divorce
08.30  Registration

9.15  Chair’s introduction

Elspeth Talbot-Rice QC
Barrister
XXIV OLD BUILDINGS

9.30  This House Believes that Trust Disputes Should be Heard in Private

Debate

The Honourable Mr Justice David Hayton
CARIBBEAN COURT OF JUSTICE

10.15  Kiss & Tell: Disclosure from Beneficiaries – is Jersey or Guernsey right?

Sir Michael Birt
Former Bailiff
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11.00  Coffee

11.30  ADR Provisions in Trusts Legislation - a New route for Solving Trust’s Problems or an Unlikely Road to Take?

Andreas Kistler
Partner
CAREY OLSEN

David Brownbill QC
Barrister
XXIV OLD BUILDINGS

The Honourable Mr Justice David Hayton
THE CARIBBEAN COURT OF JUSTICE

12.30  It’s Not My Liability..... Is It?

• TSP/CSP liability for breach of trust

Edward Cumming
Barrister
XXIV OLD BUILDINGS

1.15  Lunch

2.15  How Much? Quantification of Breach of Trust Claims

Graeme McPherson QC
Barrister
4 NEW SQUARE

Sanna-Liisa Valtanen
Director
ASSET RISK CONSULTANTS

3.00  In the Looking Glass: Holding Companies & Reflective Loss

Alan Steinfeld QC
Barrister
XXIV OLD BUILDINGS

3.45  Tea

4.15  Fears for TIEAs

Nathaniel Turner
Director
ASW LAW

Daniel Martineau
Executive Chairman
SUMMIT TRUST

5.00  On the Couch with Mandy Saligari: Dealing with Difficult Beneficiaries

• The family framework where there is a high maintenance parent(s)
• The resulting roles and relationships
• Who holds the power?
• Avoidant, entitled, self-destructive behaviour: Addiction
• How to spot addiction, how to intervene and how & why to get proper help

Mandy Saligari
Founder & Clinical Director
CHARTER HARLEY STREET

Elspeth Talbot-Rice QC
Barrister
XXIV OLD BUILDINGS

5.45  Chair’s Summation & Close of Conference

5.50  Welcome Drinks Reception
Networking & Interactivity at Trans Trusts 2015

08.00 - 08.30   Registration

08.30 - 09.20   Breakfast Briefings (choose 1 of 3)
Briefing 1   Jurisdiction Hopping: Planning & Litigation
Briefing 2   Latin America or Asia / China
Briefing 3   Specification of a Trustee in the New Landscape

09.30   Chair’s Opening Remarks
Richard Hay
Partner
STIKEMAN ELLIOTT

09.40   Global Tax Co-ordination and Cartelization: Why is it Happening and What are the Implications?
Dan Mitchell
Senior Fellow
CATO INSTITUTE

10.20   Growing Support for Redistribution: Panacea or Looming Collapse of the Welfare State?
Jolyon Maugham QC
Barrister
DEVEREUX CHAMBERS

11.20   Tax Authorities: Sharpening Tools of the Trade
• FATCA / CRS
• Central / public registers of beneficial ownership information for companies and trusts
• Multilateral convention on tax assistance

Interactive Voting
Have your say at Trans Trusts. Every delegate will have their own, wireless voting device. Delegates will be able to vote on key questions and issues during the event with live results immediately available on screen.

Welcome Drinks
Attend the welcome drinks reception at the Grand Kempinski Hotel. Delegates just attending on the 17th & 18th June are welcome to attend this reception along with those delegates attending the Litigation conference.

Gala Dinner
Enjoy a fabulous networking evening at the picturesque and inspiring Swiss National Museum with a drinks reception on the Geneva Star sail boat to take you there, the evening of the 17th June. Transport, entry, drinks and dinner included in your conference attendance.

“An excellent and varied conference, beautifully chaired and a good opportunity to meet others”
Withers

“Extraordinarily good”
Barclays
12.20 Penalties for Wealth Advisors and Trustees
Simon Jennings
Partner
RAWLINSON & HUNTER

1.00 Lunch

2.00 Crucial Updates

The Hayton Trust Law Overview
The Honourable Mr Justice David Hayton
THE CARIBBEAN COURT OF JUSTICE

3.00 The Trust Company Conundrum: Balancing Risk, Profit & Client Service
In a world of increasing regulation and litigation, it is becoming ever more difficult for trust companies to achieve a successful balance of client service, risk mitigation and profit. In this session we will examine the pressures on trust companies to deliver a high level of client service while protecting their own position in respect of regulatory and other pressures and remaining profitable.

Joe Donohoe
Director
ASSET RISK CONSULTANTS

Stella Mitchell-Voisin
Managing Director
SUMMIT TRUST

Helen Hatton
Managing Director
SATOR REGULATORY CONSULTING

Charmaine Tucker
President & CEO
LOMBARD ODIER TRUST LIMITED

3.40 Coffee

4.00 Voluntary Disclosures: Are they Working?
As governments impose new standards of reporting and exchange of financial information, taxpayers who have been remiss in complying with their tax and reporting obligations are more at risk than ever to detection and prosecution. What can these taxpayers do to fix their historical deficiencies in compliance? Is a voluntary disclosure the best option for these taxpayers?

Peter A. Wong
Partner
BORDEN LADNER GERVAIS LLP

Ray McCann
Chartered Tax Adviser & Council Member of the Chartered Institute of Taxation

John Cassidy
Partner
CROWE CLARK WHITEHILL

4.40 Privacy & Confidentiality Implications

Dr. Charles Poncet
Partner
CMS LAW

Rachel Atkins
Partner
SCHILLINGS

Michael Farrant
Director
PROJECT ASSOCIATES

Further panelists to be announced

5.30 End of Day One

Gala Dinner
6.30 Geneva Star Sail Boat Departs to Chateau Prangins
8.00 Gala Dinner at the National Swiss Museum, Chateau Prangins
10.15 Bus return to Geneva

Hosted by

“Hugely informative, stuffed with impressive speakers and delegates and great fun to boot”
XXIV Old Buildings

“Excellent speakers, good spread of topics and a great venue”
29 Bedford Row

“Transcontinental trusts always tackles the major issues that people in the private client world are talking about”
States of Jersey
Breakfast Briefings with the Experts

08.30 - 09.20

Enjoy informal briefings and conversation over coffee and croissants with the experts of your choice. (choose 1 of 3)

Day 1

**Briefing 1**

**Jurisdiction Hopping: Planning & Litigation**

This session will consider the extent to which parties to trust disputes are able to choose where their claims are litigated, and therefore how to obtain a tactical advantage in those disputes.

- Why does it matter? The importance of choosing your forum
- Jurisdiction in trust disputes: the basic principles
- The impact of ‘exclusive jurisdiction’ clauses post-Crociani
- Anti-suit injunctions

**Keith Robinson**
Partner
APPLEBY

**Briefing 2**

**UK Tax Implications**

**Nick Dunnell**
Partner
FARRER & CO

**Briefing 3**

**Specification of a Trustee in the New Landscape**

- The client perspective: the perfect skill set – confidentiality, transparency, compliance and expertise
- The trustee perspective: Has the role of the trustee simply become too high risk?
- Protecting trustees: limiting personal liability for trustees & directors through indemnities, letters of wishes, the assistance of the court
- Destruction of the government of India principle: pressure upon trustees to pay and display

**Arabella Murphy**
Partner
MAURICE TURNOR GARDNER

Day 2

**Briefing 4**

**Family Governance – the Soft and the Hard Issues**

This session focuses on how to get a family to focus on the issues they need to consider, and then how to implement them in terms of structuring:

- How do you gain the family’s trust and commitment?
- What are the soft issues?
- What are the issues in particular jurisdictions?
- What sorts of structures are appropriate?
- Use of PTCs
- Other issues in governance structures

**Otto-Hans Nowak**
Counsel
BORDEN LADNER GERVAIS

**Wei Kang**
Associate
BORDEN LADNER GERVAIS

**Briefing 5**

**Trust Law & Structuring**

- 21st century structuring options
- Bend before it breaks: stress testing trust structures
- How to balance a settlor’s need for control and avoiding risks of challenge
- When is too much control detrimental to a structure?
- Estate and succession planning in a Brussels IV world

**Bart Peerless, Dominic Lawrance, Michael Wells-Greco, Piers Master**
Partners
CHARLES RUSSELL SPEECHLYS

**Briefing 6**

**Cross Border Planning for Divorce**

- The client perspective: the perfect skill set – confidentiality, transparency, compliance and expertise
- The trustee perspective: Has the role of the trustee simply become too high risk?
- Protecting trustees: limiting personal liability for trustees & directors through indemnities, letters of wishes, the assistance of the court
- Destruction of the government of India principle: pressure upon trustees to pay and display

**Dawn Goodman**
Partner
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### Transcontinental Trusts 2015

16th June 2015 – Day Two

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NEW PERSPECTIVES FROM UNMISSABLE GUEST SPEAKERS

Arabella Murphy  
Partner  
MAURICE TURNOR GARDNER

Sir Michael Birt  
Former Bailiff  
STATES OF JERSEY

Bart Peerless  
Partner  
CHARLES RUSSELL SPEECHLYS

Joe Donohoe  
Director  
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RMW LAW

Michael McKay  
Founder  
MCKAY CONSULTING

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CHARLES RUSSELL SPEECHLYS

Graeme McPherson QC  
Barrister  
4 NEW SQUARE

Dawn Goodman  
Partner  
WITHERS

Alan Steinfeld QC  
Barrister  
XXIV OLD BUILDINGS

Sanna-Liisa Valtanen  
Director  
ASSET RISK CONSULTANTS
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<td>Peter Cotorceanu</td>
<td>Partner</td>
<td>ANAFORD AG</td>
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<td>Attorney</td>
<td>BUTLER SNOW</td>
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<td>Founder &amp; Clinical Director</td>
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Gold Partners

Borden Ladner Gervais - With more than 750 lawyers, intellectual property agents, and other professionals working in six major Canadian cities, Borden Ladner Gervais LLP is a pre-eminent full-service Canadian law firm focusing on business law, litigation and intellectual property solutions. Our Wealth Management Group has expertise, both nationally and internationally, with tax and estate planning, trust and estate administration, and dispute resolution services. We often advise and implement offshore trust and corporate structures for high net worth families and individuals for a variety of purposes. We can also assist foreign and domestic taxpayers with undertaking voluntary disclosures with local tax authorities. For further on our Wealth Management Group, please visit www.blg.com or contact: Peter A. Wong pwong@blg.com +1 (604) 640-4005

Asset Risk Consultants - Established in 1995, Asset Risk Consultants (‘ARC’) is an independent and regulated investment consulting firm with a heritage of helping private clients, charities, professional advisors, family offices and their trusted advisers understand and meet their diverse investment objectives. With offices in London, Guernsey, Jersey and Toronto, and over 60 analysts and directors, ARC turns investment data into investing intelligence for clients around the globe.

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Insight ● Independence ● Innovation ● Integrity

Gala dinner host

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www.summittrustgroup.com

Carey Olsen is a market leading offshore law firm. We deliver exceptional services to our clients from the key offshore financial centres of the British Virgin Islands, the Cayman Islands, Guernsey and Jersey. We also have an established presence in Cape Town and the City of London.

Our contentious trust lawyers advise corporate and individual trustees, settlors, beneficiaries, protectors and dependents on all areas of trust work that are or have the potential to become contentious. We also work with onshore advisers in the context of international trust disputes involving our offshore jurisdictions. As well as advising on the most significant cases to be heard before the courts in our locations, we also represent clients before the Privy Council.
Partner Opportunities at TRANS TRUSTS GENEVA 2015

As well as high profile speaking opportunities, here are a few ideas for exclusive and innovative options still available:

- Lunch sponsorship
- Audience voting technology
- Smoothie bar
- Wi-Fi
- Phone Charging
- Flash drive
- At event app
- Welcome drinks reception

THE ELEMENTS OUTLINED BELOW ARE INCLUDED WITH ALL SPONSORSHIP PACKAGES

DURING THE EVENT

**DELEGATE PASSES**
- You will be entitled to 1 delegate pass to offer to colleagues, clients or prospects

**EXHIBITION SPACE**
- You will receive a prime exhibition space providing you with an excellent platform to network with prospective clients. Size: 3m x 2m
- You will be entitled to 2 exhibit passes (to manage your exhibit booth only)

**BRANDING**
- On site signage: Your logo will feature on all non-exclusive on-site (banners) signage at the conference.
- Your company logo will feature on the front cover of the conference documentation pack
- Documentation insert: You may include 1 page (double-sided) of marketing collateral within the conference documentation pack. Size: A4 or US Letter size (8.5 x 11 inches or 216 x 279 mm)

PRE-EVENT MARKETING

**MARKETING AVENUES**
- Informa Marketing Database
- Media partner networks to over 15,000 contacts
- Designated Conference website
- Hardcopy and Electronic conference brochure
- Postal invitations
- Email campaigns

**BRANDING**
- Your company logo to feature prominently on the publicity brochure
- Your company logo to feature prominently on the conference website + an 80-word corporate profile
- Your company logo to feature prominently on all marketing emails

**CLIENT RELATIONS**
- You will receive a 30% discount rate on delegate passes to offer colleagues, clients and prospects

**POST CONFERENCE**
- You will receive a basic version of the delegate list two weeks prior to the event
- You will receive a post-conference delegate list including all contact details except email addresses

FOR FURTHER INFORMATION ON PARTNERING

David Gold
IBC Conferences
david.gold@informa.com
+44 (0)20 7017 7243
Exclusive 20% Discount:
Quote VIP Code FKW52827EMSPK when registering

Terms and Conditions
Additional Requirements

Exhibitors are responsible for the arrangement and payment of their own travel and accommodation. If you wish to book a room, please call Venue Search on +44 (0) 20 8546 6166 or email beds@venuesearch.co.uk stating that you are an IBC delegate.

GET IN TOUCH
Sales Team
Informa Business Group
+44 (0)20 7017 7828 or email integrity@iirltd.co.uk

Data Protection
The personal information which you provide to us will be held by us on a database. You agree that IBC may process your information for: (a) providing information about products and services, (b) updating your documentation purchase via the event website (the event web address is near the top of the booking form). Alternatively, call our customer service team on +44 (0) 20 7017 7790. If you do not wish your details to be available to companies in the Informa Group, or selected third parties, please contact the Database Manager, Informa UK Ltd, Maple House, 149 Tottenham Court Road, London, W1T 7AD. Tel: +44 (0)20 7017 7077, fax: +44 (0)20 7017 7900 or email integrity@iirltd.co.uk.

Documentation orders can only be processed on receipt of credit card details. To ensure we provide the highest level of security for your credit card details we are unable to accept such payments via email or fax, which ensures that the details never stored on our network. To make payment by credit card, please enter your credit card details in our secure payments website that you will use when making your booking via the event website (the event web address is near the top of the booking form). Alternatively, call our customer service team on +44 (0) 20 7017 7790 or email info@informa.com quoting the reference number printed on the mailing.

If you do not wish your details to be available to companies in the Informa Group, or selected third parties, please contact the Database Manager, Informa UK Ltd, Maple House, 149 Tottenham Court Road, London, W1T 7AD. Tel: +44 (0)20 7017 7077, fax: +44 (0)20 7017 7900 or email integrity@iirltd.co.uk.

Please note the conference fee does not include travel or hotel accommodation costs.

No Discount for 3rd and subsequent delegates.

We are happy to accept a replacement delegate for the whole event, however delegate passes cannot be split or shared between delegates under any circumstances.

Discounts
All discounts can only be applied at the time of registration and discounts cannot be combined.

All discounts are subject to approval (apart from early booking discounts which are available to everyone).

TERMS AND CONDITIONS

Please remember to quote FKW52827 when registering.