

All times in Atlantic Daylight Time (Bermuda Time)

## Conference Day One

2<sup>nd</sup> September

08.00 ***Conference Welcome: Your Digital Platform Explained***

- **Video Introduction** to the event platform – **on demand** throughout the event
- Take some time to familiarise yourself with digital event features.
- Contact delegates and have your first video chats on the platform

09.00 **Chairmen's Opening Remarks – The State of Play Amid the Crisis**

**Jonathan Conder**

Partner

**Macfarlanes**

**Basil Zirinis**

Partner

**Sullivan & Cromwell LLP**

**Session guest:**

**Suzanne Kingston**

Consultant

**Mills & Reeve**

09.30 **BDA's Welcome Address**

**Lynessa Lightbourne**

Business Development Manager

**BDA**

09.35 **Minister of Finance Welcome**

**The Hon. Curtis L. Dickinson, JP, MP**

Minister of Finance

**Bermuda**

09.40 **Where Should I settle?**

Sara (a fictitious high-net-worth individual) is considering which Jurisdiction to settle in. Under consideration are the **UK, US, Italy and Switzerland**. What are the pros and cons of each?

Moderator:

**Clare Maurice**

Partner

**Maurice Turnor Gardner**

**Piers Master**  
Partner  
*Charles Russell Speechlys LLP*

**Zena M. Tamler**  
Partner  
*Sullivan & Cromwell LLP*

**Nicola Saccardo**  
Partner  
*Maisto E Associati*

**Philippe Pulfer**  
Partner  
*Walder Wyss Attorneys at Law*

10.30 **Coffee Break – Round Table Group Video Chats**

- Click on “coffee break” to open a view of a conference floor with lots of round tables.
- Each table will be labelled with a different **ice-breaker theme**.
- Click on one of the tables to join a video chat with **up to 6 people**.
- Keep making **serendipitous encounters** by leaving one table and joining another.

11.15 **Breakout Sessions**

Stream 1 <b>Where Should I Settle?</b>	Stream 2 <b>Litigation</b>	Stream 3 <b>Next Generation</b>
<p><b>Moderator’s Opening Remarks</b></p> <p><b>Clare Maurice</b> Partner <i>Maurice Turnor Gardner</i></p>	<p><b>Moderator’s Opening Remarks</b></p> <p><b>Elsbeth Talbot Rice QC</b> Barrister <i>XXIV Old Buildings</i></p>	<p><b>Moderator’s Opening Remarks</b></p> <p><b>Joanne Morse</b> Director <i>Family Office Services</i></p>
<p>11.25 <b>UK</b></p> <p><b>Jonathan Riley</b> Partner <i>Fladgate</i></p> <p><b>Kathryn Bradbury</b> Partner <i>Payne Hicks Beach</i></p> <p><b>Sarah Cormack</b> Partner <i>Mills &amp; Reeve LLP</i></p>	<p><b>Use and Abuse of Trustee Powers</b></p> <p><b>John Machell QC</b> Barrister <i>Serle Court</i></p> <p><b>Thomas Dumont QC</b> Barrister <i>Radcliff Chamber</i></p>	<p><b>Reflecting the Priorities of the New Generation</b></p> <p><b>Michelle Wolfe</b> Managing Director <i>Meritus Trust Company</i></p> <p><b>Robert Broderick</b> Partner <i>Payne Hicks Beach</i></p> <p><b>Rose Chamberlayne</b> Partner <i>Wiggin Osborne Fullerlove</i></p>

<p>12.05 <b>US</b></p> <p><b>Stanley A. Barg</b> Partner <i>Kozusko Harris Duncan</i></p> <p><b>Elizabeth A. Kubanik</b> European Counsel <i>Sullivan &amp; Cromwell LLP</i></p>	<p><b>Crisis &amp; Disruption: Impacts for the Private Client and Litigation?</b></p> <p><b>Nicole K. Mann</b> Partner <i>McDermott Will &amp; Emery</i></p> <p><b>Geoffrey Kertesz</b> Partner <i>BDB Pitmans</i></p>	<p><b>Working with Non- traditional Families</b></p> <p><b>Michael Mylonas QC</b> Barrister <i>Serjeants' Inn</i></p>
--	--	---

12.45 **Lunch Break**

- Click on **General Networking** to see a list of all the attendees and contact them
- Click on **Interest-Led Networking** to highlight attendees based on your shared interests and contact them.
- Take time to **visit our sponsors on the Exhibition Floor**. Click on a sponsor logo to access content and video chat with a representative.

13.45 **Global Litigation Round-Up**

**Moderator**

**Rachael Reynolds**

Partner

*Ogier*

**Joshua S. Rubenstein**

Partner

*Katten Muchin Rosenman LLP*

**Keith Robinson**

Partner

*Carey Olsen*

**Gilead Cooper QC**

Barrister

*Wilberforce Chamber*

14.30 **Digital Conference Launch Party**

- Click on "Launch Party" to open a view of the party floor with lots of chat areas.
- Each chat area will be labelled with a different **ice-breaker theme**.
- Click on one of the chat areas to join a video chat with **up to 6 people**.
- Keep making **serendipitous encounters** by leaving one chat area and joining another.

15.30 **Day One Close**

## Conference Day Two

3<sup>rd</sup> September

### 08.00 *Breakfast Meetups- Round Table Group Video Chats*

- Click on "breakfast chat" to open a view of a conference floor with lots of round tables.
- Each table will be labelled with a different **ice-breaker theme**.
- Click on one of the tables to join a video chat with **6 other people**.
- Keep making **serendipitous encounters** by exiting one table and joining another.

### 09.00 **Chairmen's Opening Remarks**

**Jonathan Conder**

Partner

**Macfarlanes**

**Basil Zirinis**

Partner

**Sullivan & Cromwell LLP**

### 09.10 **Where Should I Locate My Structures?**

Having settled in the UK, Sara is now pondering where she should locate her structures. **US, Bermuda, Switzerland or Channel Island**

Moderator

**Sonia Velasco**

Partner

**Cuatrecasas Gonçalves Pereira**

**Dina Sanna**

Partner

**Day Pitney**

**Peter Pearman**

Director

**Conyers**

**Stella Mitchell-Voisin**

Managing Director

**Summit Trust International**

**Paul Hodgson**

Deputy Group Head of Trusts

**Butterfield**

### 10.00 **Anti-Bartlett Clauses: Normal Service Resumed?**

**Jonathan Speck**

Managing Partner

**Mourant Ozannes**

**Alison Dyer**  
Managing Director  
*Estera*

10.40 **Coffee Break – Round Table Group Video Chats**

- Click on “coffee break” to open a view of a conference floor with lots of round tables.
- Each table will be labelled with a different **ice-breaker theme**.
- Click on one of the tables to join a video chat with **up to 6 people**.
- Keep making **serendipitous encounters** by exiting one table and joining another.

11.20 **Breakout Sessions**

Stream 1 <b>Where Should I Locate My Structures?</b> Sara digs deeper	Stream 2 <b>Litigation</b>	Stream 3 <b>Beyond Trusts</b>
<b>Moderator’s Opening Remarks</b>  Sonia Velasco Partner <i>Cuatrecasas Gonçalves Pereira</i>	<b>Moderator’s Opening Remarks</b>	<b>Moderator’s Opening Remarks</b>  Raul-Angelo Papotti Head of Tax <i>Chiomenti</i>
11.30 <b>US</b>  Katrina Robinson Director <i>Teton Trust Company</i>  Kevin Packman Partner <i>Holland &amp; Knight</i>	<b>Capacity: Handling with Care</b>  Anthony Poulton Partner <i>Baker &amp; McKenzie</i>  Michael Cash Partner <i>Penningtons, Manches, Cooper</i>	<b>Use of Mutual Funds by Families</b>  Gary Heynes Partner, Head of Private Client <i>RSM UK</i>  Manuel Hack Partner <i>RMS Luxembourg</i>  Art Giacosa Tax Principal <i>RSM US</i>
12.10 <b>Cayman Islands</b>	<b>Firewall Provisions in Matrimonial Disputes</b>  Alex Carruthers Founding Partner <i>Hughes Fowler Carruthers</i>	<b>Exploring Alternative Structuring Options</b>  Nicholas Jacobs Partner <i>Forsters</i>

**Gretchen Beall Schumann**  
Partner  
*Cohen Rabin Stine Schumann  
llp*

**Dawn Goodman**  
Partner  
*Withers*

**Tom Wiese Lombard**  
Senior Managing Director  
*Lombard International*

**Amy M. Staehr**  
Partner  
*Longs, Reimer, Winegar*

12.50 **Lunch Break**

- Click on **General Networking** to see a list of all the attendees and contact them
- Click on **Interest-Led Networking** to highlight attendees based on your shared interests and contact them
- Take time to visit our sponsors on the **Exhibition Floor**. Click on a sponsor logo to access content and video chat with a representative

13.50 **Embracing ESG: Impact Investing, Philanthropy and Beyond**

**Grant Wilson**  
Chief Investment Officer  
*Asset Risk Consultants*

14.30 **Drinks Reception**

- Click on "Drinks Reception" to open a view of the reception floor with lots of chat areas.
- Each chat area will be labelled with a different **ice-breaker theme**.
- Click on one of the chat areas to join a video chat with **up to 6 people**.
- Keep making **serendipitous encounters** by leaving one chat area and joining another.

15.30 **Day Two Close**

## Conference Day Three

4<sup>th</sup> September

### 08.00 *Breakfast Meetups- Round Table Group Video Chats*

- Click on "breakfast chat" to open a view of a conference floor with lots of round tables.
- Each table will be labelled with a different **ice-breaker theme**.
- Click on one of the tables to join a video chat with **up to 6 people**.
- Keep making **serendipitous encounters** by exiting one table and joining another.

### 09.00 **Chairmen's Opening Remarks**

**Jonathan Conder**

Partner

**Macfarlanes**

**Basil Zirinis**

Partner

**Sullivan & Cromwell LLP**

### 09.10 **Perspectives on Building A Career in Private Wealth**

Moderator

**Line-Alexa Glotin**

Partner

**UGGC Avocates**

**Sara Schroter Ross**

General Counsel

**Meritus**

**Jane Pearce**

Global Head of Trust

**Butterfield Trust**

### 09.50 **Trusts & Injunctions**

Moderator

**Beatrice Puoti**

Partner

**Burges Salmon**

**James Price**

Partner

**Stewarts Law**

**Richard Wilson QC**  
Barrister  
*Serle Court*

**Steven White**  
Partner  
*Appleby*

10.30 **Coffee Break – Round Table Group Video Chats**

- Click on “coffee break” to open a view of a conference floor with lots of round tables.
- Each table will be labelled with a different **ice-breaker theme**.
- Click on one of the tables to join a video chat with **up to 6 people**.
- Keep making **serendipitous encounters** by exiting one table and joining another

11.15 **Breakout Sessions**

Stream 1 <b>Jurisdiction Insights</b>	Stream 2 <b>Litigation</b>	Stream 3 <b>Regulation</b>
<b>Moderator’s Opening Remarks</b>	<b>Moderator’s Opening Remarks</b>	<b>Moderator’s Opening Remarks</b>
<b>Michael Silva</b> Partner <i>DLA</i>	<b>Nicole Buncher</b> Senior Associate <i>Clifford Chance</i>	
11.25 <b>Bermuda</b>	<b>Court Intervention in Trust Administration</b>	<b>DAC6: Signalling a Brave New World for Transparency?</b>
<b>Vanessa Schrum</b> Group Head of the Private Client and Trusts Department <i>Appleby</i>	<b>Robert Pearce QC</b> Barrister <i>Radcliffe Chambers</i>	<b>Piers Barclay</b> Partner <i>Macfarlanes</i>
		<b>Richard Hay</b> Partner <i>Stikeman Elliot</i>
12.05 <b>Key Trends and Developments in Latin America</b>	<b>Fixing Settlor and Trustee Mistakes</b>	<b>Swiss Trust Regulation</b>
<b>Alessandro de Fonseca</b> Partner <i>Mattos Filho</i>	<b>Graeme Kleiner</b> Partner <i>Charles Russell Speechlys LLP</i>	<b>David Wallace Wilson</b> Partner <i>Schellenberg Wittmer</i>



**Camilo Cortes**  
Partner  
**Dentons & Cardenas**

**Mark Lindley**  
Partner  
**Boodle Hatfield**

**Javier Canosa**  
Partner  
**Canosa Abogados**

12.45 **Lunch Break**

- Click on **General Networking** to see a list of all the attendees and contact them
- Click on **Interest-Led Networking** to highlight attendees based on your shared interests and contact them
- Take time to visit our sponsors on the **Exhibition Floor**. Click on a sponsor logo to access content and video chat with a representative

13.45 **The International Private Client World: Lessons Learnt & Conference Takeaways**

**Georgina James**  
Partner  
**Farrer**

14.30 **Conference Competition Awards & Farewell Drinks**

- Find out who:
  - Attended the most sessions
  - Joined the most chats
  - Visited the most exhibition stands
- If you're the lucky winner, you'll **receive a prize from our Sponsor!**
- Connect with your peers for a *\*farewell drink*

**\*The platform will remain live for another two weeks so you can get in touch with everyone that you missed.**

15.30 **Conference Close**