All times in Atlantic Daylight Time (Bermuda Time)

Conference Day One
2nd 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

Lynesha 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
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

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<td>Where Should I Settle?</td>
<td>Litigation</td>
<td>Next Generation</td>
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<td>Clare Maurice</td>
<td>Elspeth Talbot Rice QC</td>
<td>Joanne Morse</td>
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<td>Partner</td>
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<td>Maurice Turnor Gardner</td>
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<td>Family Office Services</td>
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<td><strong>11.25 UK</strong></td>
<td><strong>Use and Abuse of Trustee Powers</strong></td>
<td><strong>Reflecting the Priorities of the New Generation</strong></td>
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<td>Jonathan Riley</td>
<td>John Machell QC</td>
<td>Michelle Wolfe</td>
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<td>Partner</td>
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<td>Kathryn Bradbury</td>
<td>Thomas Dumont QC</td>
<td>Robert Broderick</td>
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<td>Sarah Cormack</td>
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<td>12.05</td>
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|       | **Stanley A. Barg**  
|       | Partner  
|       | *Kozusko Harris Duncan*  
|       | **Elizabeth A. Kubanik**  
|       | European Counsel  
|       | *Sullivan & Cromwell LLP*  
|       | **Crisis & Disruption: Impacts for the Private Client and Litigation?**  
|       | **Nicole K. Mann**  
|       | Partner  
|       | *McDermott Will & Emery*  
|       | **Geoffrey Kertesz**  
|       | Partner  
|       | *BDB Pitmans*  
|       | **Working with Non-traditional Families**  
|       | Michael Mylonas QC  
|       | Barrister  
|       | *Serjeants’ Inn*  
| 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
3rd 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
10.40 **Coffee Break – Round Table Group Video Chats**

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- 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**

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| **Where Should I Locate My Structures?**
Sara digs deeper | **Litigation** | **Beyond Trusts** |

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| Sonia Velasco
Partner 
*Cuatrecasas Gonçalves Pereira* | Sonia Velasco
Partner 
*Cuatrecasas Pereira* | Raul-Angelo Papotti
Head of Tax 
*Chiomenti* |

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| Katrina Robinson
Director 
*Teton Trust Company* | **Capacity: Handling with Care**
Anthony Poulton
Partner 
*Baker & McKenzie* | **Firewall Provisions in Matrimonial Disputes**
Alex Carruthers
Founding Partner 
*Hughes Fowler Carruthers* |
| Kevin Packman
Partner 
*Holland & Knight* | Michael Cash
Partner 
*Penningtons, Manches, Cooper* | **Exploring Alternative Structuring Options**
Nicholas Jacobs
Partner 
*Forsters* |

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<th>12.10 <strong>Cayman Islands</strong></th>
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| **Use of Mutual Funds by Families**
Gary Heynes
Partner, Head of Private Client 
*RSM UK* | **Firewall Provisions in Matrimonial Disputes**
Alex Carruthers
Founding Partner 
*Hughes Fowler Carruthers* | **Exploring Alternative Structuring Options**
Nicholas Jacobs
Partner 
*Forsters* |
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Alex Carruthers
Founding Partner 
*Hughes Fowler Carruthers* | **Exploring Alternative Structuring Options**
Nicholas Jacobs
Partner 
*Forsters* |
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
4th 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.
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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
10.30 Coffee Break – Round Table Group Video Chats

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- 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 piers 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**