

AGENDA

[SOCIALS \(/socials\)](/socials)[DAY ONE \(/day-one\)](/day-one)[DAY TWO \(/day-two\)](/day-two)

24
November

DAY ONE

Chair: Kim Whaley TEP, Global Congress Programme Chair; WEL Partners, Canada

08:00 Registration and refreshments

Exhibits open

08:45 Welcome from Conference Chair

Kim Whaley TEP, Global Congress Programme Chair; WEL Partners, Canada

08:55 Welcome from Platinum Sponsor

Speaker to be confirmed

09:00 STEP strategic update

Emma Lovell, CEO of STEP Worldwide

Paolo Panico TEP, Chair of STEP Worldwide

09:30 Keynote 1: Change and challenging assumptions: how will shifts in global demography and wealth shape policy?



Laura Tamblyn Watts, CEO, CanAge: Canada's National Seniors' Advocacy Organization, Canada

[View more](#)

10:00 Mainstage Session 1 – From chancery to code: trusts, foundations and family structures in a global, digital age

Marta Cenini TEP, Maisto e Associati, Italy

Paul Davidoff TEP, Kingsley Napley, UK

Naro Zimmerman TEP, Deputy Head of Caribbean - Private Capital Services, JTC, Cayman Islands

[View more](#)

10:45 Networking and refreshments

-

11:15 Keynote 2: AI – Lessons from the past shaping the future

Paul O'Brien, Director, Compton Innovation, UK

[View more](#)

11:45 Mainstage Session 2: A professional's approach to client capacity: can you spot the concerns?

Moderator: Bryan Gilmartin, Co-Managing Partner, Whaley Estate Litigation Partners, Canada

Dr. Robin Jacoby, Professor Emeritus of Old Age Psychiatry, University of Oxford, UK

Dr. Sara Mitchell, Neurologist, Sunnybrook Health Sciences Centre, Canada

Dr. Kenneth Shulman, Professor, Psychiatry, University of Toronto, Canada

[View more](#)

12:30 Networking lunch

-

13:45 Specialist sessions

-

13:45 Option 1: Debanking: topical policy session led by STEP's Public Policy Committee

Dr Matthew Lenaghan, Solicitor, RMW Law LLP, UK

Andy Mielczarek, Chief Executive Officer, Bermuda Commercial Bank Limited, Bermuda

13:45 Option 2: Litigation prevention: wills, estates, trusts and tax planning

Moderator: Clare Maurice TEP, Partner, Maurice Turnor Gardner LLP, UK

Rodrigo Castillo Cottin, Partner, Rimôn, Colombia

Laura Kearns TEP, Partner, Carey Olsen, Bermuda

Dr Diane Le Grand de Belleruche TEP, Partner, Arkwood, France

[View more](#)

13:45 Option 3: The Family Constitution Lab: facilitating values, decision-making and difficult conversations in modern families

Pablo Álvarez de Linera Granda, Partner, Alvarez de Linera Lawyers, Spain

Cynthia Lee, Central Cove Group, Hong Kong

[View more](#)

14:30 Change rooms for next Specialist Sessions

-

14:40 Specialist Sessions repeated – options as listed above

-

15:25 Networking and refreshments

-

15:55 Mainstage Session 3: The clash of transparency and privacy

Filippo Nosedo, Partner, Mishcon de Reya LLP, UK

David Wallace Wilson TEP, Schellenberg Wittmer, Switzerland

Bruce Zagaris TEP, Partner, Berliner, Corcoran and Rowe, LLP, USA

[View more](#)

16:40 Mainstage Session 4: Whose law rules? Aligning multiple systems of law jurisdictions in one plan

Jane Ren TEP, Partner, Fangda Partners, China

[View more](#)

17:25 Closing Address

Kim Whaley TEP, Global Congress Programme Chair; WEL Partners, Canada

17:30 Day 1 Close

-

19:00 Networking dinner

Venue to be confirmed

Kindly supported by Lombard Odier Trust (Bermuda) Limited
