



# STEP - Society of Trust and Estate Practitioners

Association STEP Suisse-Romande - Office of The Secretary



STEP Suisse Romande Secretariat  
4, Rue des Terreaux-du-Temple, P.O. Box 5023, 1211 Geneva 11  
Tel: +41 22 715 23 25 Fax: +41 22 715 23 26  
Website: [www.step-swissromand.ch](http://www.step-swissromand.ch)

Geneva, September 10th, 2012

## *The fifth annual John Usher Memorial Lecture & Champagne Cocktail*

**Thursday, November 1<sup>st</sup>, 2012**, at the **MANDARIN ORIENTAL HOTEL, GENEVA** (please note change of venue) Doors open at 17:30. The Lecture and proceedings will commence at 18:00, end at 19:30 and be followed by a Champagne Reception and gourmet refreshments, closing at 20:30.

We are very enthusiastic to welcome from Hong Kong, our well-known speaker and long-time STEP member, Mr. Philip Marcovici, who will speak on:

*"Switzerland and Trusts for Today's Global Families:  
Is the Massive Opportunity Properly Understood?"*

### *The changing needs of global wealth owners and the positive effects of tax transparency*

Philip Marcovici is the former chair of the European tax practice of Baker & McKenzie and of the steering committee of the Firm's international wealth management practice, of which he was one of the founders. Philip was also one of the founders of the Baker & McKenzie Asia-Pacific tax practice and has been involved in a number of firm and practice group management functions. He was also the founder and CEO of LawInContext, the interactive knowledge venture of global law firm, Baker & McKenzie. Philip retired from his CEO role with the company as from the end of 2010, and from his Chairmanship of the company as from the end of 2011.

Philip Marcovici's legal practice involved advising multinationals, financial institutions and families on the international and domestic aspects of Canadian, Hong Kong and U.S. taxation, as well as on commercial issues relevant to cross-border transactions. Philip has also been active in advising clients on issues related to the use of trusts and insurance products and has and continues to work with governments and international agencies on strategy and treaty negotiations. He continues to also be actively involved in education and strategy across the legal and tax spectrum and he maintains a number of non-executive board roles with financial institutions and others active in the wealth management sector and continues to consult with families, family offices, financial institutions and governments worldwide.

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This is a unique and worthy opportunity for all of us, who knew and appreciated John Usher TEP, a pillar of STEP Suisse Romande for over 15 years, to honor his memory amongst friends and colleagues.

Belinda Ferré - Special events officer - STEP Suisse Romande

\*\*This event is graciously co-sponsored and underwritten by ThatcherMacKenzie - Executive Recruitment, **Landmark Fiduciaire (Suisse) S.A.**, Geneva (*John Usher's former employer*), and the **STEP** Suisse Romande Branch

**Thatcher**  
MacKenzie

 **Landmark**  
Fiduciaire (Suisse) S.A.





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## STEP Evening Event – "John Usher Memorial Lecture and Cocktail"

### RESERVATIONS:

Please return the reservation form attached either by fax or by e-mail, or register online on our website: [www.step-swissromand.ch](http://www.step-swissromand.ch) (click on "Meetings", and log in as "STEPmembers" with the password "ST1992EP"). Please register (and pay) as soon as possible. For the purposes of your CPD (Continuing Professional Development), the event will count as "1 structured CPD hour".

To : Michelle Hunt, STEP Suisse-Romande Secretariat

Fax N° : (022) 715 23 26

E-mail : STEP@rawlinson-hunter.ch

Please reserve a place for me at the **Thursday, November 1<sup>st</sup>, 2012** Evening Event at the **Mandarin Oriental Hotel, Geneva** – Quai Turrettini 1, 1201 Geneva – (please note change of venue) doors open at 17:30, and proceedings commence at **18:00** prompt. The registration fee is **CHF 55.-** for STEP members and **CHF 75.-** for all other guests. (**Warning:** All attendees whose payment has not been received 24 hours preceding the event will be required to pay at the door).

We are liable for reservations made, so "No shows" will be required to pay. *Please note that part of the proceeds from the Event will be donated to the STEP Suisse Romande Students Fund.*

PRINT NAME :

Names of additional Guests :

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Tel. n°: .....

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E-mail: .....

.....

Company: .....

### CONFIRMATION OF PAYMENT

My payment of CHF ..... has been made as follows:

- By bank transfer to UBS S.A., Geneva, for credit to Association STEP Suisse-Romande, account n° 0240-615299 and IBAN CH19 0024 0240 6152 9901H.
- **IMPORTANT – please make sure names are mentioned by your bank!**
- Please let me have a BVR (**in this case, address please!**)

(Signed)

