



Swiss and Liechtenstein STEP Federation

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# STEP Alpine Conference 2024

Private wealth: Generations and  
technology

22-23 May 2024

Congress Kursaal Interlaken

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## Day one - 22 May 2024

[Printable agenda](#)

**Registration, breakfast and networking**

**09:45 CEST**

Exhibits open

**Welcome from Swiss & Liechtenstein STEP  
Federation and Chair's opening remarks**

**10:25 CEST**

**Speaker**

Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland

**The New Swiss National Orchestra****10:30 CEST**

A performance of a representative group from the Orchestra

**STEP strategic update****10:45 CEST****Speaker**

Kelly Greig TEP, Chair of STEP Worldwide

**Welcome by Investec****11:00 CEST****Keynote address: Geopolitical + technology shifts  
= The reshaping of the global economy****11:05 CEST**

- The loss of the Western world monopoly on innovation and its implications for business and investment.
- Globalization in retreat in the Western world, and alive and kicking in emerging market economies.
- The discordant global economy quartet: Deep structural crisis in Europe, deceleration and uncertainty for the US economy, economic stabilization and change of growth model in China, India as the emerging player on the block.
- The rise of Middle powers and economic and business implications of that trend.

**Speaker**

Claude Smadja, Chairman, Smadja & Smadja Strategic Advisory, Switzerland and USA

## Economy and Finance

11:35 CEST

- Global outlook – moderate growth, falling inflation, monetary policy
- Geopolitics & US elections – status quo holding but under threat
- How to structure your portfolio and manage trends and risks in 2024

### Moderator

Claude Smadja, Chairman, Smadja & Smadja Strategic Advisory, Switzerland and USA

### Speakers

Federico Ceresole, Goldman Sachs, Switzerland

Samy Chaar, Chief Economist, CIO Switzerland, Lombard Odier, Switzerland

## Swiss and Liechtenstein STEP Federation - Awards

12:20 CEST

### Presented by

Dr Johanna Niegel TEP, Chair of STEP Vaduz Centre; Secretary, SLSF, Liechtenstein

Filippo Turato TEP, Member of the Executive Committee, Capital Trustees AG, Switzerland

## Lunch and networking

12:35 CEST

## Swiss update

13:50 CEST

- Inheritance legislation: what is happening at domestic and international level?
- The UK is about to abolish its res non-dom regime – a good moment to review the Swiss forfait rules (the so-called lump sum taxation).
- After having sunk their trust project, are the Swiss about to float a family foundation?

- Be introduced to the Swiss L-QIF, the Limited Qualified Investor Fund.

### **Moderator**

Michael Fischer TEP, Partner, Attorney at Law, Certified Tax Expert, Fischer Ramp Buchmann AG, Switzerland

### **Speakers**

Jacqueline Burckhardt Bertossa TEP, Attorney-at-Law, Civil Law Notary, Specialist Succession Law SPA, Burckhardt AG, Switzerland

Philipp Fischer, Attorney-at-Law/Partner, Oberson Abels SA, Switzerland

Dr. Natalie Peter TEP, Lawyer/Partner, Blum & Grob Attorneys at Law, Switzerland

## **A focus on Liechtenstein: Succession planning for families holding family companies**

**14:50 CEST**

- Thinking in generations: the necessity of succession planning for a smooth transition to the next generation(s)
- Trusts and foundations as viable tools for succession planning
- How the Liechtenstein foundation allows families to create a clear governance structure
- Practical examples of foundations holding family businesses

### **Moderator**

H.S.H. Prince Michael of Liechtenstein, Executive Chairman, Industrie- und Finanzkontor Etablissement, Liechtenstein

### **Speakers**

Dr. Daniel Damjanovic, Marxer & Partner, Liechtenstein

H.S.H. Prince Hubertus von und zu Liechtenstein, Member of the Foundation Board, LGT Group Foundation, Liechtenstein

Dunja Suessli, Head Family Office Services & Philanthropy, NSF Services Trust reg., Liechtenstein

## **Networking and refreshments**

**15:50 CEST**

## Trust law update: Recent cases and litigation

16:20 CEST

- How confidential is trust information
- Arbitration of trust disputes
- Protecting trust assets
- Obtaining the Court's assistance: applications for guidance

### Moderator

Richard Wilson KC TEP, Serle Court, UK

### Speakers

Charles Gothard, Partner, Macfarlanes LLP, UK

Fred Milner TEP, Counsel, Maurant, Jersey

David W. Wilson TEP, Partner/Attorney at Law, Schellenberg Wittmer Ltd, Switzerland

## Day one closing remarks

17:30 CEST

### Speaker

Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland

## Drinks reception

18:30 CEST

Victoria Jungfrau Grand Hotel, Interlaken

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## Gala Dinner

19:30 CEST

Victoria Jungfrau Grand Hotel, Interlaken

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Day two

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# STEP Alpine Conference 2024

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## Day two - 23 May 2024

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**Breakfast and networking**

**08:00 CEST**

Exhibits open

**Chair's opening remarks**

**08:50 CEST**

**Speaker**

Dr. Guillaume Grisel TEP, Vice-Chairman of the Swiss & Liechtenstein STEP Federation; Partner, Schellenberg Wittmer, Switzerland

**Planning for minors****09:00 CEST**

- Structuring and managing the assets of minors
- Caring for minors in blended families
- Inheritance arrangements for stepchildren
- Guardianship and adoption as planning tools

**Moderator**

Alice Martin TEP, Partner, Charles Russell Speechlys AG, Switzerland

**Speakers**

Clémence de Weck, Attorney at Law/Partner, Bourg & Etude d'avocats, Switzerland

Rosie Schumm, Partner, Forsters, UK

**Marriage and alternatives****09:45 CEST**

- Consequences of not getting married: tax, inheritance, power of representation, right to information from doctors
- How to “mimic” the effects of a marriage: trusts, contracts, powers of attorney

**Moderator**

Stephanie Jarrett TEP, Owner, Offices of Stephanie A. Jarrett, Switzerland

**Speakers**

James Campbell TEP, Partner, Ogier, Jersey

Beatrice Puoti, Partner, Stephenson Harwood, UK

Paul Taylor TEP, Partner, Borden Ladner Gervais LLP, Canada

**Networking and refreshments****10:45 CEST**



## Planning for old age

**11:15 CEST**

- Mental Capacity challenges facing practitioners
- Update on the Global Representative Power (GRP)
- Definition of capacity in the context of trusts and practical problems faced
- The international overlay – what to consider if relocating
- Passing on the estate earlier: gift strategy vs trusts

### Moderator

Lisa Cornwell TEP, Partner, Private Clients & Family Offices, PwC, Switzerland

### Speakers

Kelly Greig TEP, Partner and Head of Estate Planning and Tax Team, Steele Raymond LLP Solicitors, UK

Emma Heelis-Adams TEP, Partner, Burges Salmon, UK

## Lunch and networking

**12:00  
CEST**

## Opening remarks: Digitalization/AI of the trust industry

**13:15  
CEST**

### Speaker

Cyril Bouzguir TEP, Banking Economist, Dreyfus Sons & Co. Ltd, Banquiers; Member of the STEP Alpine conference organising committee; Treasurer of the Swiss and Liechtenstein STEP Federation

## LegalTech, RegTech, SupTech and how to use AI in everyday trust work

**13:20  
CEST**

### Moderator

Ross Belhomme TEP, Founder, Belhomme Law, Switzerland

### Speakers

Adrian Akers, Chief Product Officer, TrustQuay Viewpoint, UK  
Dr. Marc Holitscher, National Technology Officer, Microsoft, Switzerland  
Konrad Meier, AI Law Leader, Senior Manager, Ernst & Young Ltd,  
Switzerland  
David Rosenthal, Partner, VISCHER AG, Switzerland

## Final remarks

**14:50**  
**CEST**

### Speaker

Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner,  
Rawlinson & Hunter (Switzerland) AG, Switzerland

## End of Conference

**15:00**  
**CEST**

Day  
one






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