

STEP Alpine Conference 2025
Protecting families across generations
7-8 May, Congress Kursaal Interlaken, Switzerland

Tuesday 6 May	
18.00	<p>Pre-conference drinks Victoria Jungfrau Grand Hotel, Interlaken <i>Kindly sponsored by NFG Partners</i></p>
Wednesday 7 May	
Day one: Technical, legal & tax topics <i>Chair: Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland</i>	
10.00	<p>Registration and welcome refreshments Exhibits open <i>Kindly sponsored by Davidoff Law</i></p>
10.40	<p>Welcome from Swiss & Liechtenstein STEP Federation and Chair's opening remarks <i>Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland</i></p>
10.45	<p>STEP strategic update <i>Kelly Greig TEP, Chair of STEP Worldwide</i></p>
11.00	<p>Welcome by Investec <i>Sonia Santos, Head of Swiss Banking and Wealth, Investec</i></p>
11.05	<p>Keynote address: Montreux Jazz Festival: a legacy of ever-evolving creativity Since 1967, the Montreux Jazz Festival has reinvented itself, combining tradition and innovation. Through excerpts from Festival archives, Mathieu Jaton will explore how this iconic festival has evolved, welcoming legends and new talent alike, while preserving its heritage, all the while offering a unique glimpse into its rich history. <i>Mathieu Jaton, CEO of Montreux Jazz Festival, Switzerland</i></p>
11.35	<p>Economy and finance</p> <ul style="list-style-type: none"> • Tariffs and trade wars • US influence on world economy • Worldwide economy back on track? • A focus on Switzerland's economy <p><i>Moderator: Michael McKay, Founder/Presenter of "The McKay Interview", Switzerland</i> <i>Dirk Effenberger, Head Investment Risk at Chief Investment Office, UBS AG, Switzerland</i> <i>Dr. Stephanie Lang, Head of Portfolio Consulting Continental Europe, BlackRock, Germany</i></p>

12.20	<p>Swiss and Liechtenstein STEP Federation - Awards Presented by: <i>Dr Johanna Niegel TEP, Vice-President – Relationship Manager, Industrie- und Finanzkontor Etablissement, Liechtenstein</i> <i>Filippo Turato TEP, Member of the Executive Committee, Capital Trustees AG, Switzerland</i></p>
12.35	<p>Lunch and networking <i>Kindly sponsored by HSBC</i></p>
13.50	<p>Swiss update</p> <ul style="list-style-type: none"> • Estate planning and asset structuring • Foundation law • Regulatory / compliance • Taxation / immigration <p><i>Moderator: Natalie Peter TEP, Blum&Grob, Switzerland</i> <i>Prof. Rashid Bahar, Partner/Professor, Advestra AG, Switzerland</i> <i>Matthias Bizzarro, Partner, Bar & Karrer, Switzerland</i> <i>Jutta Gangsted TEP, Senior Associate, Lenz & Staehelin, Switzerland</i></p>
14.50	<p>Liechtenstein - A role model for compliant wealth preservation</p> <ul style="list-style-type: none"> • Characteristics of Liechtenstein’s wealth preservation model • Tension field between protection and control • Tax, compliance and regulatory considerations <p><i>Moderator: Jessica Schaedler TEP, Jeeves Group, Liechtenstein</i> <i>Prof. Dr. Alexandra Butterstein, Professor for Company, Foundation and Trust Law, University of Liechtenstein, Liechtenstein</i> <i>Martin A. Meyer, Managing Partner, WeTrust Tax AG, Liechtenstein</i> <i>Dr. Andreas Schurti TEP, Partner, Schurti Partners Attorneys at Law Ltd., Liechtenstein</i></p>
15.50	<p>Networking and refreshments</p>
16.20	<p>Trust law update</p> <ul style="list-style-type: none"> • Purpose trusts (including STAR): use of powers, certainty and enforcement • Choice of jurisdiction: entry points for a court to accept jurisdiction, privilege issues, court first seized, use of information obtained in litigation, the use of costs orders, confidentiality considerations • Friend or Foe: hostile litigation and the implications, what is “hostile”?, issues of costs • Capacity and Undue influence: the borderline situations and how the courts have been addressing these situations • Corporate settlors and their intentions: reiteration of the need for intentions and purposes of trusts <p><i>Moderator: Richard Wilson KC TEP, Barrister, Serle Court, UK</i> <i>Nancy Chien TEP, Partner, Head of Private Client, Bedell Cristin, Jersey</i> <i>Richard Grasby TEP, Partner, Appleby, Hong Kong SAR</i> <i>David Wilson TEP, Partner / Attorney at Law, Schellenberg Wittmer Ltd, Switzerland</i></p>

17.30	<p>Day one closing remarks <i>Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland</i></p>
18.30	<p>Drinks reception Victoria Jungfrau Grand Hotel, Interlaken <i>Kindly sponsored by Cadell</i></p>
19.30	<p>Gala Dinner Victoria Jungfrau Grand Hotel, Interlaken <i>Kindly sponsored by Schellenberg Wittmer</i></p>
<p>Thursday 8 May <i>Day two: "Softer" topics: Protection Morning Chair: Dr. Guillaume Grisel TEP, Vice-Chairman of the Swiss & Liechtenstein STEP Federation; Partner, Schellenberg Wittmer, Switzerland Afternoon Chair: Cyril Bouzguir TEP, Banking Economist, Dreyfus Sons & Co. Ltd, Banquiers, Member of the STEP Alpine conference organising committee, Committee member of STEP Basel</i></p>	
08.00	<p>Breakfast and networking <i>Exhibits open</i></p>
08.50	<p>Chair's opening remarks <i>Dr. Guillaume Grisel TEP, Vice-Chairman of the Swiss & Liechtenstein STEP Federation; Partner, Schellenberg Wittmer, Switzerland</i></p>
09.00	<p>Protection from external risks</p> <ul style="list-style-type: none"> • Protection of data: <ul style="list-style-type: none"> ○ CTA, CRS, sending information to banks/funds etc. ○ Tips to protect family data ○ Confidentiality in Switzerland • Asset protection against creditors - what structures work best? • Expropriation and geopolitical factors and uncertainties, administrative assistance <p><i>Moderator: Filippo Nosedà TEP, Mishcon de Reya, UK Andrew De La Rosa, Barrister and Attorney-at-Law, ICT Chambers, Cayman Islands Werner Jahnel, Attorney at law, LALIVE SA, Switzerland Olivier Sigg TEP, Partner, Walder Wyss Ltd, Switzerland</i></p>

10.00	<p>Protection against risks from within</p> <ul style="list-style-type: none"> • Trusts and Divorce (and equivalents): exploiting vulnerabilities in trust structures including excessive protector powers and gaps in the firewall • When the fiduciaries are no longer trusted, for good reason or bad; attacks on fiduciary duties: removal of trustees, executors, protectors • Dealing with impossible beneficiaries, settlors, and protectors: no contest clauses and other creatures • All in or all out? How far are anti-Bartlett provisions actually relied on in practice? • Incapacity amongst younger family members from accident, addiction or illness • Assisted dying: potential for abuse and the trustee's or executor's dilemma <p><i>Moderator: Paolo Panico TEP, Private Trustees, Luxembourg Michael Fischer TEP, Partner, Fischer Ramp Buchmann AG, Switzerland Mark Harper, Partner, Hughes Fowler Carruthers, UK Shan Warnock-Smith KC TEP, King's Counsel, ICT Chambers/5 Stone Buildings, Cayman Islands/UK</i></p>
11.00	<p>Networking and refreshments</p>
11.30	<p>Protecting family businesses, identity and values</p> <p>This panel will explore how multi-generational family businesses protect their identity, values, and legacy over time, with insights from legal advisors and members of long-established entrepreneurial families. Discussions will focus on the challenges of transferring the business across generations, structuring effective governance, and integrating younger family members into leadership roles, highlighting both the strategies adopted and the difficulties encountered along the way.</p> <p><i>Moderator: Marco Cerrato TEP, Partner, Maisto e Associati, Italy Diana Frescobaldi, CEO Retail & Restaurant, Marchesi Frescobaldi Società Agricola Srl, Italy Nicolas De Toledo, Board Member, Pharmacie Principale, Switzerland Marie-Therese Yates, Managing Director, J.P. Morgan, Switzerland</i></p>
12.30	<p>Lunch and networking <i>Kindly sponsored by Global Precious Metals</i></p>
13.30	<p>Opening remarks <i>Cyril Bouzguir TEP, Treasurer of the Swiss & Liechtenstein STEP Federation and STEP Basel; Trust and Corporate Manager, Dreyfus Sons & Co. Ltd, Banquiers, Switzerland</i></p>

13.35	<p>Under attack: physical and cyber protection This session will provide a practical case study showing real life areas of vulnerability, and how to deal with events if the unthinkable happens.</p> <p><i>Moderator: Jeff Schiemann, Chief Information Security Officer, AMINA Bank AG, Switzerland</i> <i>Martin Bader, Research Associate, Bern State Police (Kantonspolizei Bern), Switzerland</i> <i>Claudio Bazzani, Partner, Homburger AG, Switzerland</i> <i>Peter Connolly, Founder and CEO, Toro</i></p>
14.50	<p>Final remarks <i>Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland</i></p>
15.00	<p>End of Conference Networking and refreshments available</p>