

STEP Alpine Conference 2025

Protecting families across
generations

7-8 May 2025
Congress Kursaal Interlaken

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Agenda

Here's what's scheduled for the event. Please click on each session for further information.

All Dates
06/05-08/05

Tuesday
06/05

Wednesday
07/05

Thursday
08/05

6 May 2025

18:00 CET

Pre-conference drinks

Victoria-Jungfrau Grand Hotel & Spa, Interlaken

Kindly sponsored by NFG Partners

7 May 2025

09:45 CET

Registration and welcome refreshments

Exhibits open

10:25 CET

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

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

10:30 CET

Musical performance

10:45 CET

STEP strategic update

Kelly Greig TEP, Chair of STEP Worldwide

11:00 CET

Welcome by Investec

11:05 CET

Keynote address

Matthieu Jaton, CEO of Montreux Jazz Festival

11:35 CET

Economy and finance

- US influence on world economy
- Tariffs and trade wars
- Worldwide economy back on track?
- A focus on Switzerland's economy

12:20 CET

Swiss and Liechtenstein STEP Federation - Awards

Presented by:

Dr Johanna Niegel TEP, Vice-President – Relationship Manager, Industrie- und Finanzkontor Etablissement, Liechtenstein

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

12:35 CET

Lunch and networking

13:50 CET

Swiss update

- Estate planning and asset structuring
- Foundation law
- Regulatory / compliance
- Taxation / immigration

Moderator: Natalie Peter TEP, Blum&Grob, Switzerland

Professor Rashid Bahar, Advestra, Switzerland

Matthias Bizzarro, Bar & Karrer, Switzerland

14:50 CET

Liechtenstein - a role model for asset protection

- Legal and regulatory update from Liechtenstein
- Update on intended Amendment of Liechtenstein Trust Law
- Characteristics of asset protection in Liechtenstein
- Distinction: asset protection in civil law vs tax law matters
- Tension field between protection and control
- Tax considerations when protecting assets
- UBO Register

Moderator: Jessica Schaedler TEP, Director, Jeeves Group, Liechtenstein

Professor Dr. Alexandra Butterstein TEP, University of Liechtenstein

Martin A. Meyer, WeTrust Group, Liechtenstein

Dr. Andreas Schurti TEP, WalPart Trust, Liechtenstein

15:50 CET

Networking and refreshments

16:20 CET

Trust law update

Moderator: Richard Wilson KC TEP, Serle Court, UK

Nancy Chien TEP, Partner, Head of Private Client, Bedell Cristin, Jersey

Richard Grasby TEP, Partner, Appleby, Hong Kong SAR

Rachael Reynolds, Global Senior Partner, Ogier, Cayman Islands

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

17:30 CET

Day one closing remarks

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

18:30 CET

Drinks reception and gala dinner

Victoria Jungfrau Grand Hotel, Interlaken

The pre-gala dinner drinks reception is kindly sponsored by Cadell

The gala dinner is kindly sponsored by Schellenberg Wittmer

8 May 2025

08:00 CET

Refreshments and networking

Exhibits open

08:50 CET

Chair's opening remarks

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

09:00 CET

Protection from external risks

- Protection of data:
 - 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

*Moderator: Filippo Nosedà TEP, Partner, Mishcon de Reya, UK
Werner Jähnel, Lalive, Switzerland
Olivier Sigg TEP, Walder Wyss, Switzerland*

10:00 CET

Protection against risks from within

*Moderator: Paolo Panico TEP, Private Trustees, Luxembourg
Mark Harper, Hughes Fowler Carruthers, UK
Shan Warnock-Smith KC TEP, ICT Chambers, Cayman Islands*

11:00 CET

Networking and refreshments

11:30 CET

Protecting family businesses, identity and values

*Moderator: Marco Cerrato TEP, Maisto e Associati, Italy
Marie-Thérèse Yates, Managing Director, J.P. Morgan, Switzerland*

12:30 CET

Lunch and networking

13:30 CET

Opening remarks

Cyril Bouzguir TEP, Treasurer of the Swiss & Liechtenstein STEP Federation and STEP Basel; Trust and Corporate Manager, Dreyfus Sons & Co. Ltd, Banquiers, Switzerland

13:35 CET

Under attack: physical and cyber protection

Peter Connolly, Founder and CEO, Toro

14:50 CET

Final remarks

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

15:00 CET

End of Conference

Networking and refreshments available



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