

HYBRID

ZÜRICH

TUESDAY, 26 AUGUST 2025 | 12:00 - 14:00

CRS 3.0 and CARF: Tax Transparency 2026 – What Swiss Trustees Need to Know Now!

SPEAKERS

Matthias Staubli, Director, Tax & Legal Services PwC www.pwc.ch

Amanda Ess, Manager, Tax & Legal Services PwC www.pwc.ch

TOPIC

CRS 3.0 and CARF:

Tax Transparency 2026 – What Swiss Trustees Need to Know Now!

- **CRS 3.0: New Obligations and Increased Transparency**

An overview of the most important changes, concrete action items, and recommendations for AEOI-compliant client management.

- **CARF: Crypto-Assets in the Spotlight of Tax Authorities**

An overview of the new reporting framework, key pitfalls, and practical case studies for Swiss trustees.

SPEAKERS CV

MATTHIAS STAUBLI advised national and international financial institutions in Switzerland, Liechtenstein and abroad for Operational tax topics for more than 10 years. He leads the Operational Tax Practice at PwC Switzerland and Liechtenstein. Matthias supports financial institutions on a wide range of operational tax matters, with a particular focus on CRS, FATCA, CARF, and related topics, supporting clients from initial implementation through to ongoing compliance. Matthias has extensive experience conducting periodic reviews and audits for multinational financial institutions across Switzerland and Europe.

AMANDA ESS is a Manager in our Operational Tax practice and has almost 10 years of experience specializing in Automatic Exchange of Information (AEOI). She joined PwC from the Tax Authority, where she was dealing with AEOI since its implementation. Amanda advises financial institutions in Switzerland and Liechtenstein on compliance and implementation of FATCA and CRS regulations.

STEP Office

Corinne Graf

STEP ZÜRICH CENTRE
SUPPORTER



STEP ZÜRICH CENTRE
SUPPORTER



LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH

STEP ZÜRICH CENTRE
SUPPORTER

KYC360

Date

TUESDAY, 26 AUGUST 2025 | 12:00 - 14:00

Venue

HOTEL GLOCKENHOF ZÜRICH
Sihlstrasse 31
8022 Zürich
Switzerland
[link to venue](#)

Registration by

MONDAY, 25 AUGUST 2025

CPD

1 hours towards CPD obligation

Fee

present Members 80.00 CHF
present Non-Members 100.00 CHF
present STEP Students 50.00 CHF
present Sponsors free of charge
on-line Members 40.00 CHF

REGISTER NOW

Timetable on-site

11.45 – 12.00 / Registration
12.00 – 13.00 / Talk & Questions
13.00 – 14.00 / Lunch & Networking

Timetable on-line

11.57 - 12.00 / Registration (Swiss time, GMT+1)
12.00 - 13.00 / Talk & Questions
Link and Presentation will be provided in advance.
Talk will be recorded.

Annulation

Booked places can be cancelled up to 24 hours before the event. Only cancellations made in due time will be refunded. Substitutions may be made at any time.

MORE **STEP** EVENTS

CATEGORY

REGION

MONTH

TUESDAY, 01 JULY 2025

STEP Lugano – Evento Inaugurale NextGen

THURSDAY, 03 JULY 2025

Relocation to Switzerland - an update

TUESDAY, 26 AUGUST 2025

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