



# STEP ALPINE CONFERENCE

Resilient succession  
planning for private wealth

**SOLD  
OUT**

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## Agenda

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

All Dates 05/05-07/05	Tuesday 05/05	Wednesday 06/05	Thursday 07/05
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**5 May 2026**

**18:00 CET**

## Pre-conference drinks

Hotel Beau Rivage Interlaken

*Kindly sponsored by NFG Partners*

## 6 May 2026

10:00 CET

### Registration, refreshments and networking

Exhibit opens

10:40 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*

10:45 CET

### STEP strategic update

*Emma Lovell, CEO of STEP Worldwide*

11:00 CET

### Welcome by Gold Sponsor

Henry Blumenthal, Investec Wealth & Investment International, South Africa

11:05 CET

### Trust investments: Traps for trustees

- Delegation to Investment Managers
- Does a trustee's duty stop with delegation? Duty to monitor investments? Benchmarking?
- Holding companies under trusts: do anti-Bartlett clauses work?
- Diversification of investments
- Speculative investments, for example, crypto assets

*Moderator: James Campbell TEP, Partner, Ogier, Jersey*

*Sarah Bayliss, Barrister, XXIV Old Buildings, UK*

*Philippe de Salis TEP, Chairman, Swiss Association of Trust Companies, Switzerland*

*Stella Wolfsgruber, Partner, Avalor Investment AG, Switzerland*

**11:50 CET**

### **Transparency: What's at stake when information crosses borders and enforcement / (personal) li...**

- Swiss AML legislation and the proposed regulations for a UBO register (Transparenzregister) for companies
- What is at stake when information crosses borders with registers from the families' and professionals' perspectives?
- Implementation of UBO registers for companies worldwide: how level is the playing field?
- Requirements of the registers, control of access, "legitimate interest" definitions, audits and sanctions for abuse
- Liabilities of individuals nominated for access by an intermediary and wider dispersion of information within a group

*Moderator: Stephanie Jarrett TEP, Chair at STEP Geneva and STEP Council Member*

*Alexander Greter, Partner, Lenz & Staehelin, Switzerland*

*Fred Milner TEP, Mourant, Jersey*

**12:35 CET**

**Lunch and networking**

**13:45 CET**

**Single Family Offices - the hidden champions of the Swiss Financial Industry**

- Economic significance of single family offices for Switzerland and international developments
- Governance and asset holding structures
- Tax implications for families and family office, and regulatory framework
- Active Diversification: Jurisdictional risk and policy changes to be treated like financial risks

*Moderator: Dr. Kurt Moosmann TEP, Vice-Chairman, Elsa Peretti Holding AG, Switzerland*

*Michael Fischer TEP, Partner, Fischer Ramp Buchmann, Switzerland*

*Felix Oeschger, Managing Partner, Mosaik Capital, Switzerland*

*Dr. Michael Viana, Head Wealth Transfer, Networks & Client Office, UBS Switzerland AG, Switzerland*

**14:30 CET**

### **Trust law update: Trusts in times of turmoil**

This session will focus on trends across the UK, Switzerland, Channel Islands and Caribbean and address the following questions:

- How are trusts, trustees or trust law changing in response to a rapidly changing world?
- Are the reasons for establishing trusts changing?
- How are long established trusts being changed to be ready for the future?
- How are the different jurisdictions reacting? What needs to happen going forwards

*Moderator: Richard Dew TEP, Barrister, Ten Old Square, UK*

*Monique Bhullar TEP, Walkers, Cayman Islands*

*Angela Calnan TEP, Partner, Collas Crill LLP, Guernsey*

*Stefanie Meyenhofer-Peters, Attorney at law; Counsel, STAIGER Attorneys at Law Ltd., Switzerland*

**15:30 CET**

### **Swiss and Liechtenstein STEP Federation - Awards**

[View the Winner](#)

*Presented by:*

*Dr Johanna Niegel TEP, Head of Business Development, Industrie- und Finanzkontor Etablissement, Liechtenstein*

*Kindly sponsored by Evelyn Partners*

**15:45 CET**

**Networking and refreshments**

**16:15 CET**

### **Swiss trustee regulation: Lesson in practice for regulated trustees**

- FinIA Update: license requirements, supervisory system, audit cycles
- Particularities and peculiarities of Swiss trustee regulation
- Outlook: what to expect in the future?

*Moderator: Simon Wälti, CEO, OSFINcontrol, Switzerland*

*Taulant Avdija, Partner, Head Regulatory & Compliance, BDO, Switzerland*

*Marc Blumenfeld, Managing Director, Alithis AG, Switzerland*

**17:00 CET**

### **Keynote: The high-performance mindset: from Formula 1 to the fight against dementia**

From the razor-sharp world of Formula 1, Allan McNish brings lessons in pressure, precision and performance. In this talk, he reveals what it takes to compete at the highest level - how teams align behind a clear vision, how leaders make split-second decisions and how resilience separates contenders from champions.

Mark Stewart will then show how these same high-performance principles have been embedded within the Race Against Dementia model - bringing Formula 1 thinking into the laboratory to accelerate breakthroughs and inspire researchers in the global fight against dementia.

*Moderator: Richard Pease TEP, Consultant, Past STEP Worldwide Chair, Past STEP Geneva Chair, Switzerland*

*Allan McNish, Director of the Audi Revolut F1 Team Driver Development Programme, Audi Revolut F1 Team, Monaco*

*Mark Stewart, Chairman, Race Against Dementia, 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

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

*The gala dinner is kindly sponsored by Schellenberg Wittmer*

**7 May 2026**

08:00 CET

### **Refreshments and networking**

Exhibits open

08:50 CET

### **Morning Chair's opening remarks**

*Filippo Turato TEP, Partner, Capital Trustees AG, Switzerland*

09:00 CET

### **Between a rock and a hard place: Where trustees and advisors face conflicts**

This panel will cover typical conflict situations faced by trustees, protectors and advisors, including in particular:

- Trust internal conflicts
- Conflicts resulting from multiple roles within the same structures
- Conflicts resulting from an affiliation with a bank or asset manager
- Conflicts arising from a clash of the applicable laws

*Moderator: Andrea Dorjee-Good TEP, Attorney at Law, Schellenberg Wittmer Ltd, Switzerland*

*Robert Avis TEP, Charles Russell Speechlys, Switzerland*

*Dr. Vladimir Good TEP, Präsidial, Liechtenstein*

*Mark Hubbard TEP, New Square Chambers, UK*

**09:45 CET**

### **Families: Origins of conflict and mechanisms of resolving conflicts within them**

- Through three case studies (2 live), this session explores the origins of conflicts
- It will address specific moments of conflicts such as succession, dealing with different personalities, diverging visions, and more
- Additionally, it will cover a number of solutions, some well known such as governance or family charters, and some less known that can prove equally powerful

*Moderator: Denise Kenyon-Rouvinez, Professor of Family Office, Switzerland*

*Genevieve Sykes, Flint, Switzerland*

*Nicolas Syz, CEO, Syz Bank, Switzerland*

**10:45 CET**

### **Networking and refreshments**

**11:15 CET**

### **Picking your battles: The use of mediation and/or arbitration in trust and estates disputes**

- Overview of ADR processes – mediation, arbitration, early neutral evaluation
- Why arbitration? - pros and cons
- New Supplemental Swiss Rules for Trust, Estate and Foundation Disputes
- Trust arbitrations in other jurisdictions – Liechtenstein, UK, Bahamas, Channel Islands, New Zealand
- Why mediation? – pros and cons
- Other forms of ADR, for example early neutral evaluation

*Moderator: Steven Kempster TEP, Partner, Withers LLP, UK*

*Dr. Hannes Arnold, Attorney at Law / Senior Partner, Gasser Partner, Liechtenstein*

*Dr. Stefanie Pfisterer, Partner, Homburger AG, Switzerland*

*Eve Pienaar, Commercial Mediator, CEDR, UK*

**12:15 CET**

### **Lunch and networking**

13:30 CET

### Afternoon Chair's 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

### Reputation on the line: Fighting fires, shielding advisers, and making the best of 'bad' press

*Moderator: Sandrine Giroud, Partner, LALIVE SA, Switzerland*

*Michael Evans, Joint Managing Director, Byfield, UK*

*Callum Galbraith, Partner, Sheridans Solicitors LLP, UK*

*Michael Macfarlane, Principal Partner, Michael Macfarlane Associates, UK*

14:50 CET

### Final remarks

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

15:00 CET

### End of conference

Networking and refreshments available



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