Trusts Across the Frontiers
Delegate Registration Form Fax: +44 (0)1423 85 11 51

Title: First Name:

Surname:

Preferred name on badge:

Firm:

Position:

Postal Address:

Tel No:

Fax No:

Email:

Access/Dietary Requirements:

PLEASE NOTE: We may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event.

Breakout Sessions

Please indicate your preferred session for Day 1 at 2.30pm and again at 3.45pm and also Day 2 at 2.40pm and again at 3.55pm

Tuesday		2:30pm	3.45pm
Option 1	The Caribbean's approach to tax and information exchange agreements	☐	☐
Option 2	The shifting paradigm in philanthropy	☐	☐
Option 3	Regional jurisdictional trust update – A dialogue between a draftsperson and trustees	☐	☐
Option 4	Current thoughts on letters of wishes	☐	☐
Wednesday		**2:40pm**	**3.55pm**
Option 1	Succession law case study using trusts (follow up from earlier panel session)	☐	☐
Option 2	Purpose Trusts, STAR Trusts and VISTA Trusts – How can they be used?	☐	☐
Option 3	Foundations and trusts. How to decide which to use?	☐	☐
Option 4	Family business – Working with the next generation (follow up from earlier talk)	☐	☐

REGISTRATION FEE – please tick corresponding box

STEP Members 2 day conference and social functions Fee

☐ GBP £750 ☐ S $1,800 ☐ USD $1,250

STEP Member No:

Non STEP Members 2 day conference and social functions Fee

☐ GBP £850 ☐ S $2,050 ☐ USD $1,400

How did you hear about the conference:

☐ STEP Website
☐ STEP Journal
☐ Hong Kong Branch
☐ Singapore Branch
☐ Asian Banking & Finance
☐ Finance Asia
☐ Financial Times
☐ Asian Legal Business
☐ Singapore Law Gazette
☐ ACCA Focus
☐ STEP Email

Other publications (please say which):

Other email/web (please say which):

Social Functions

Please note the following social functions are included in the delegate rate.
Please specify which you wish to attend:

☐ **19 October** Welcome Drinks, 2nd Floor, Long Bar, Raffles Hotel
☐ **20 October** Cocktail Reception and Dinner, Bar & Billiard Room, Raffles Hotel
☐ **21 October** Farewell Cocktails and Dinner, Long Bar Steakhouse, Raffles Hotel

Further details will be supplied in due course. Please contact Laura Callicott on +44 (0)1423 85 11 57 or email laura.callicott@barkerbrooks.co.uk, if you would like to bring a guest to either of the above dinners.

Ticket prices for dinner guests not attending the conference as delegates
GBP£50 (S$125, US$85)

Payments

For secure online payments please go to our website www.step.org/conferences
Credit cards – we accept Visa, Mastercard, Switch/Maestro*

Name on card:

Card type:

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*All credit cards will be debited in pounds sterling at the rate of exchange used by your credit card provider

If paying by bank transfer please ensure all charges are covered and the last 6 digits of your invoice number are quoted.

Payments to be made in GBP (£ Sterling) to: Barclays Bank
Account Name: STEP Conferences
Sort Code: 20-03-53 Account Number: 30442585
BIC: BARCGB22 IBAN: GB48 BARC 2003 5330 4425 85

For payment queries please email debbie.paggett@step.org

Hotel Accommodation

Preferential rates have been negotiated with The Fairmont Hotel. These are available on a first-come first-served basis. To book your room please visit https://resweb.passkey.com/go/stepasia

Cancellations/Substitutions

Cancellations must be received in writing at least seven days before the date of the conference and will be subject to an administration charge of GBP50 (S$125, US$85). It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full conference fee. Substitutions may be made at the time provided the organisers are notified prior to the conference. Please note that if a non-STEP member attends in lieu of a STEP member the difference in fees will be charged.

The Financial Sector Development Fund

The Financial Sector Development Fund (FSDF) offers grants to financial sector organisations that sponsor eligible participants to training programmes that meet qualifying criteria. For enquiries, please contact the FSDF Secretariat at 6229-9396 or via email at fsdf@mas.gov.sg

Terms and Conditions

Conference documentation will be distributed at the event. STEP reserves the right to amend or cancel this conference where the occasion necessitates. In such circumstances a full refund of any registration fee will be made but STEP shall accept no further liability. Prices may be subject to change. This booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of the fees due. The conference language is English.

Data Protection

The Society of Trust & Estate Practitioners will use this information to update its databases, which will be used to provide details of STEP products and services. Please tick the box if you would prefer the Society not to use your information in this way. ☐ STEP may also contact you from time to time with details of programmes and events that may be of interest to you. Please tick the box if you would prefer the Society not to use your information in this way. ☐

Code Here

STEP
Society of Trust and Estate Practitioners

Speaker biographies continued

Mark Bridges TEP

Mark Bridges is a partner of Farrer & Co LLP in London, and specialises in tax and estate planning for substantial domestic and international individuals. His work includes advice to the world's leading families and he specialises in the creation of structures to hold international assets in a tax effective way. He also works on international succession and trust issues both contentious and non contentious.

In 1998 he was appointed the Solicitor to the Duchy of Lancaster, and in 2002 as Private Solicitor to HM The Queen.

Cynthia D'Anjou-Brown

Cynthia D'Anjou-Brown has gained a wealth of experience working in the not-for profit sector over the past 25 years. In Hong Kong she has specialised in consulting with respect to family philanthropy, non-profit management, and fundraising.

Previously, Cynthia was a Vice-President at the United Way of Greater Toronto, the largest community funder of social services in the city. Before joining the United Way, she was the Executive Director of a municipal social planning organisation responsible for community needs assessments, co-ordination of NGOs, public policy analysis, and new service development.

Cynthia has pursued her passion for generating support for charities as a professional and volunteer with several grant-making organisations. This has naturally led her to helping wealthy families with their philanthropic activities.

A graduate degree in Social Work and an undergraduate degree in Family Studies underpin her years of work as a practitioner.

Mark Jackman TEP

Mark Jackman is a Member of the Executive Management Board of Rothschild Bank AG and Head of Asia, Private Banking & Trust. He is also the Managing Director, Rothschild Trust (Singapore) Limited. Prior to this, he was the Managing Director, Credit Suisse Trust Limited, Singapore, a Member of the Executive Management Board of Credit Suisse Trust Group and Global Head of the Asia/Middle East Division.

Edmund Leow

Edmund Leow practises in the area of international tax and trade on behalf of Western and Asian multinational corporations and institutions. His practice has a focus on cross-border tax planning, transfer pricing and tax disputes. He also advises on international trade issues such as customs, WTO and free trade agreements.

He has a growing practice in advising high net-worth individuals, private banks and trust companies in personal tax, as well as in trust and estate planning matters.

Edmund was the previous President and is currently the Vice President of the Singapore Trustees Association; a Committee Member of the Singapore branch of the International Fiscal Association; a Member of the Tax Committee of the American Chamber of Commerce in Singapore; and a Member of the Law Society and Singapore Academy of Law. He is also listed on the Euromoney Guide to the world's leading tax advisers.

John Riches TEP

John Riches is a senior Principal in the Wealth Planning group of Withers LLP. John is a specialist in estate and capital tax planning for UK and non-UK domiciled individuals and has a particular focus in advising on fiduciary issues in the context of corporate transactions. He acts for a number of family offices and closely held family businesses where he works on succession and governance issues.

John has worked with STEP in a number of senior positions; he currently chairs STEP's Public Policy Committee where he has responsibility for STEP's policy response on international wealth planning issues such as the OECD HNWI initiative. John serves as a member of the Advisory Committee of the Institute for Family Business. He is also a fellow of the International Academy of Trust and Estate Lawyers and frequently lectures at leading conferences in the UK and internationally. He has also been awarded the Citywealth Magic Circle Awards 2009 for 'Lawyer of the Year'.

Jason Sharman

Jason Sharman is a Professor at Griffith University, working jointly at the Centre for Governance and Public Policy and the Griffith Asia Institute in Brisbane, Australia. He received his Ph.D. in Political Science from the University of Illinois at Urbana-Champaign. Jason's research is focused on the regulation of global finance, especially as relates to money laundering, tax and offshore financial centres. He has worked as a consultant with the World Bank, Asian Development Bank, Commonwealth Secretariat, Financial Action Task Force, Asia-Pacific Group on Money Laundering, Pacific Islands Forum and in the private sector. His fourth book, *Corruption and Money Laundering: A Symbiotic Relationship*, co-authored with David Chaikin, will be published with Palgrave in 2009

Richard Frimston TEP

Richard graduated from Imperial College London, with a degree in Physics. He qualified as an English solicitor in 1979 and an English Notary Public in 1995. Richard has been a partner with Russell-Cooke LLP since 1982 and Head of Private Client since 1993.

He has particular expertise in dealing with multi-jurisdictional estates, especially France. Richard is a member of the British Institute of International and Comparative Law, the International Academy of Estate and Trust Law, the Society of Trust and Estate Practitioners and the Association of Contentious Trust and Probate Specialists.

Richard is Chairman of the STEP Cross-Border Estates Group and a Committee member of STEP London Central Branch. He is the representative of the Law Society of England & Wales to the European Committee of the Union Internationale du Notariat (UIN) and sits on the Law Society International Issues Committee and the Council of Bars and Law Societies of Europe (CCBE) Family and Succession Law Committee.

Richard is Foreign Affairs Correspondent for Sweet & Maxwell's Private Client Business and a member of the editorial board for their publication *European Cross-Border Estate Planning*.

The EU Commission Green Papers on succession and wills {SEC(2005)270} and matrimonial property regimes {SEC(2006)952} have been of particular interest to Richard, who has given evidence to the EU Parliament Legal Affairs Committee and has also been a member of the EU Commission group of experts PRM-III/IV and PRM-III since 2006.

ABOUT THE ORGANISERS

The Society of Trust and Estate Practitioners (STEP) is a unique professional body providing members with a local, national and international learning business network. STEP provides education, training, representation and networking for its members, who are professionals specialising in trusts and estates, executorship, administration and related taxes. Members advise clients on the broad business of the management of personal finance. Full members of STEP are the most experienced and senior practitioners in the field of trusts and estates.

STEP has over 15,000 members worldwide, providing coverage of over 60 jurisdictions. For further information, visit www.step.org or email step@step.org www.step.org/asia2009

STEP ASIA CONFERENCE
20–21 OCTOBER 2009
FAIRMONT SINGAPORE
SINGAPORE

Financial Sector Development Fund (FSDF)
Grant available to delegates based in Singapore
Please see registration form for further details

Trusts Across the Frontiers

Keynote presentation:

Mr K Shanmugam
Minister for Law and Second Minister for Home Affairs, Singapore

Programme highlights:

- The use of trusts to protect assets in the current global environment
- Regional jurisdictional trust updates – a dialogue between a draftsperson and trustees
- Trusts – compliance versus confidentiality
- Legal reciprocity (comity) issues across the frontiers as they affect trusts
- Case study in respect of the use of trusts – trustees as shareholders in a family business
- The use of trusts to protect assets
- Panel session on the contribution that the offshore financial centres make to higher tax jurisdictions
- Purpose Trusts, STAR Trusts and VISTA Trusts – how can they be best used?
- Succession law case study using trusts

Delegate fee:	STEP Member GBP750	S$1,800	US$1,250
Delegate fee:	Non STEP Member GBP850	S$2,050	US$1,400

Accredited for 12 hours CPD
Law Society of England & Wales

Conference language: English

Conference Partners:

Gold
Day One — Guernsey
Day Two — RAWLINSON & HUNTER

Bronze
ROTHSCHILD

STEP
Society of Trust and Estate Practitioners

Introduction

STEP Singapore looks forward to hosting our third 'Trusts Across the Frontiers' Conference. This year's programme builds on the success of our sell-out 2007 conference combining current issues and practice sessions covering trust and tax areas, both old and new.

We have again managed to invite a truly authoritative faculty. Our keynote address, by the Singapore Minister of Law & Second Minister for Home Affairs, Mr K Shanmugam will focus on 'Singapore's Position in Relation to the Transnational Organisations as the OECD'. This will be followed by Richard Hay of the UK, addressing the issue of 'Tax and Information Agreements – The Future'. The new global framework for wealth structuring, and the use of trusts to protect assets in the current global environment receive much warranted attention.

We also focus on regional jurisdictional trust updates with a dialogue between the draftsperson and trustees. Speakers this year will travel from Jersey, Guernsey, Hong Kong, the UK, Australia, Labuan, Brunei and the USA. This conference is both varied and rigorous in providing the opportunity to review and to network. Both the presentations and break-out sessions will allow attendees to gather further insight into industry developments, post sub-prime and G20.

We look forward to seeing you in Singapore.

Angelo Venardos TEP
Chairman, STEP Singapore Branch

Speaker biographies

STEP's conference, Trusts Across The Frontiers brings together 30 top national and international speakers including:

Nick Jacob TEP
Deputy Chairman, STEP Worldwide

Nick Jacob specialises in family governance, international and domestic taxation, trusts and estate planning. His practice is significantly international, acting on large trust structures for a number of substantial institutions, for wealthy individuals, and for non-UK domiciliaries on inward investment into the UK.

Other specialisations are acting for trustees on UK corporate transactions, in trust situations where beneficiaries are divorcing, and complex trust drafting. Particular focus on clients from South East Asia.

Has been consulted as an expert witness in his field.

He is rated in the top category of Private Client practitioners in Chambers Global directory of the legal profession and has been so for a number of years. He is very highly rated in other legal directories.

Simon Beck TEP

Simon Beck is a partner in Baker & McKenzie's Miami office and a member of the Tax Practice Group. His practice focuses on international conflict of laws, international securities and banking regulations, and anti-money laundering matters with respect to the private banking and wealth management industry.

An international tax and trust lawyer with vast experience working with the world's trust and financial centres, he has successfully litigated trust cases in a number of offshore jurisdictions. He advises financial institutions and governments on regulatory, legislative and strategy issues, as well as high net worth clients with respect to their international tax planning and trust matters. Further, he conducts training sessions for executives on trust, tax, banking and securities issues. He is a frequent speaker on trust, financial services and compliance issues at conferences on international private banking, as well as international trust and estate planning.

Simon was educated in England, earning his LL.B. with Honors from the University of Bristol, England and the College of Law, where he passed the Solicitors Professional Examinations with Honors. He was later admitted to the New York Bar. He has practiced in London, Monte Carlo and Madrid, as well as in the United States, and was general counsel to a leading international private bank.

Richard Hay TEP

Richard Hay is the Co-Chairman of the STEP International Committee and head of the Private Capital Group in the London office of Stikeman Elliott, Canadian and international lawyers. The group advises on information exchange and financial regulation matters, including the initiatives pursued by the OECD, the EU, the FATF and the IMF. The group also advises on international estate planning structures for high net worth families with cross-border affairs.

Prior to entering practice, Richard lectured on tax and securities law on the Faculties of Law at the National University of Singapore and the University of Ottawa in Canada. He also clerked for the Chief Justice of the Supreme Court of Ontario.

Richard received the STEP award in 2008 for 'Outstanding Contribution to the Profession' for work related to tax information exchange and financial regulation.

Bill Ahern TEP

Bill Ahern was admitted as a solicitor in Brisbane, in 1980, where he specialised in tax planning and tax litigation. In 1984, he acquired the only legal practice in Norfolk Island, a tax-free external territory of Australia. In 1987, Bill joined Hong Kong law firm Deacons to build its tax practice. He became a partner in 1990, following his admission as a solicitor in both Hong Kong and the United Kingdom. He remained there until 1994, when he returned to Australia, where he maintained strong links with Hong Kong through representing a Jersey-based trust company in Asia, and through his continued representation of a number of Hong Kong-based clients.

In early 1999, Bill returned to Hong Kong full-time as a Consultant to law firm Lea & White, to build on his wide experience in Hong Kong revenue law, trust law and regional tax planning, including offshore aspects of Australian tax law. In October 2000, he joined an international trust company in Hong Kong as Director, Trust & Legal Affairs.

In December 2002, Bill joined HSBC Private Bank to head up Wealth and Tax Advisory Services Asia (WTASA); its tax consultancy arm. In June 2008, Bill established his own consultancy, Family Capital Conservation, specialising in advising clients and institutions in multi-jurisdictional tax and succession planning and family governance.

Conference Partners

Gold
Day One: Guernsey
Day Two: RAWLINSON & HUNTER

Bronze: ROTHSCHILD

Delegate Bag: APPLEBY

Official International Business Newspaper: FT FINANCIAL TIMES

Social Programme: Labuan IBFC, Azure Tax, JERSEY FINANCE

Exhibitors: JERSEY FINANCE, PORTCULLIS TRUSTNET, CLT INTERNATIONAL, BHI, TouchstoneGroup

STEP Conference – Trusts Across the Frontiers

	MONDAY 19 OCTOBER 2009
6:00–8:00 pm	**Welcome Cocktail Reception** **Long Bar, 2nd Floor, Raffles Hotel** **Kindly sponsored by Azure Tax**
8:00 pm	**Speaker's Dinner** **Szechaun Court, The Fairmont** **Kindly sponsored by Jersey Finance**
	DAY 1: TUESDAY 20 OCTOBER 2009
8:00 am	**Continental breakfast and registration** Exhibits open
8:45 am	**Welcome from STEP Singapore** *Angelo Venardos TEP, Chairman, STEP Singapore Branch*
8:50 am	**Welcome from STEP Worldwide** *Nick Jacob TEP, Deputy Chairman, STEP Worldwide*
	CURRENT ISSUES PRACTICE AND THEORY **CHAIR, ANGELO VENARDOS TEP, CHAIRMAN, STEP SINGAPORE BRANCH**
8:55 am	**Keynote Address** *Mr K Shanmugam, Minister for Law and Second Minister for Home Affairs, Singapore*
9:25 am	**Refreshment break**
9:40 am	**Tax and information exchange agreements – The future** *Richard Hay TEP, Stikeman Elliott, UK* ■ A review of European & US/Caribbean attitudes, precedents and politics ■ The policy, media, leverage and high level technical issues ■ Where do we go from here?
10:20 am	**The new global framework for wealth structuring (1)** *Geoff Cook, Jersey Finance, Jersey* *Jonathan Hooley, States of Guernsey, Guernsey* *Mark Jackman TEP, Rothschild Private Banking & Trust, Singapore* *Prof. Jason Sharman, Centre for Governance & Public Policy, Griffith University, Queensland, Australia* ■ Future role of IFCs ■ New regulatory framework ■ Comments on speech on TIEAs **Session kindly sponsored by Guernsey Finance**
10:50 am	**The new global framework for wealth structuring (2)** *John Riches TEP, STEP Public Policy, UK* *Gurbachan Singh TEP, KhattarWong, Singapore* *Representative from Financial Times* ■ Singapore's position on EU Savings Directive ■ EUSD – extension to discretionary trusts? ■ Information exchange on demand
11:20 am	**Networking and refreshments**
11:50 am	**A digest of recent trust cases from around the world** *Mark Bridges TEP, Farrer & Co LLP, UK*
12:20 pm	**The use of trusts to protect assets** *Kenny Foo, JP Morgan, HK* ■ What is asset protection and what is it not? ■ Asset protection laws in various jurisdictions ■ The Statute of Elizabeth and other fraudulent conveyance laws ■ Theory and practice ■ The impact of bankruptcy courts ■ The impact of divorce courts ■ Family partnerships as an alternative?
12:50 pm	**Lunch** **Kindly sponsored by Guernsey Finance**
2:00 pm	**Private Trust Companies – Practical use across the jurisdictions** *Simon Beck TEP, Baker & McKenzie LLP, Miami, US* ■ Are they suitable for everyone worth US$25m plus? ■ Should they be set up using Purpose Trusts, STAR Trusts, Foundations or Companies Ltd by Guarantee as the holding vehicle? ■ Directors' jurisdictional issues ■ The agreement with the administrator ■ Can they be properly run by family members? **Session kindly sponsored by Rothschild Trust (Singapore) Ltd**

2:30 pm	**Breakout sessions – Choose 1 from the 4 concurrent options as stated below:**
	Option 1 – The Caribbean's approach to tax and information exchange agreements *Simon Beck TEP, Baker & McKenzie LLP, Miami, US*
	Option 2 – The shifting paradigm in philanthropy *Cynthia D'Anjou Brown, HSBC Family Office Services Limited, HK* ■ The evolving donor enterprise and communities of interest ■ Emerging structures in Asia ■ Investing in the new social economy ■ More public scrutiny: changing government policies, nonprofit governance standards ■ Impact conundrum: value-for-money donated versus meeting real needs
	Option 3 – Regional jurisdictional trust update – A dialogue between a draftsperson and trustees *David Brownbill QC TEP, UK* *Martin Crawford, Labuan IBFC, Malaysia* *Bill Ahern TEP, Family Capital Conservation Limited, HK* *Luke Peng TEP, SG Trust (Asia) Ltd, Singapore* *Santhi Roy Prabhakaran, HMR Trust Ltd, Brunei* ■ Brunei ■ Labuan ■ Hong Kong ■ Singapore
	Option 4 – Current thoughts on letters of wishes *Mark Lea, Lea & White, HK & Singapore*
3:15 pm	**Networking and refreshments**
3:45 pm	**Breakout sessions repeated – Choose 1 from the 4 concurrent options as stated below:**
	Option 1 – The Caribbean's approach to tax and information exchange agreements *Simon Beck TEP, Baker & McKenzie LLP, Miami, US*
	Option 2 – The shifting paradigm in philanthropy *Cynthia D'Anjou Brown, HSBC Family Office Services Limited, HK* ■ The evolving donor enterprise and communities of interest ■ Emerging structures in Asia ■ Investing in the new social economy ■ More public scrutiny: changing government policies, nonprofit governance standards ■ Impact conundrum: value-for-money donated versus meeting real needs
	Option 3 – Regional jurisdictional trust update – A dialogue between a draftsperson and trustees *David Brownbill QC TEP, UK* *Martin Crawford, Labuan IBFC, Malaysia* *Bill Ahern TEP, Family Capital Conservation Limited, HK* *Luke Peng TEP, SG, Singapore* *Santhi Roy Prabhakaran, HMR Trust Ltd, Brunei* ■ Brunei ■ Labuan ■ Hong Kong ■ Singapore
	Option 4 – Current thoughts on letters of wishes *Mark Lea, Lea & White, HK & Singapore*
4:30 pm	**Why are IFCs suffering political attack?** *Professor Jim Hines, University of Michigan, US* ■ Are they really vehicles for crime ■ Do IFC's erode the tax base of OECD countries? ■ How do IFC's facilitate tax competition? ■ Do IFC's undermine the stability of global financial architecture? ■ Why are they suspicious to tax authorities?
5:15 pm	**Day 1 Close**
6:00 pm	**Cocktail Reception and Dinner** **East India Room/Bar & Billiard Room, Raffles Hotel** **Kindly sponsored by Labuan IFC**

	DAY 2: WEDNESDAY 21 OCTOBER 2009
	CURRENT ISSUES, PRACTICE & THEORY **CHAIR – NICK JACOB TEP, DEPUTY CHAIRMAN, STEP WORLDWIDE**
8:00 am	**Continental breakfast** Exhibits open
9:00 am	**STEP international education update** *Bill Howarth, Central Law Training International, UK Singapore and Middle East*
9:15 am	**Trusts – Compliance versus confidentiality** *Yeoh Lian Chuan TEP, Rajah & Tann LLP, Singapore* ■ Where are we going with compliance requirements? ■ Differences between jurisdictions ■ Can we wed compliance and confidentiality? ■ Why is confidentiality so important in reality?
9:45 am	**Legal reciprocity (comity) issues across the frontiers as they affect trusts** *David Brownbill QC TEP, UK* ■ Recognition of trusts in different jurisdictions ■ Jurisdiction – that of management, proper law or asset location? ■ Reciprocal enforcement of judgments ■ Divorce issues
10:15 am	**Latest developments in the US** *Mimi Hutton TEP, Withers, HK & Joseph Field, Withers Worldwide, New York* ■ US expatriation – easier or more difficult under the new rules ? ■ VD – a new US Government disease ? ■ Stop Tax Haven Abuse Act – some variations on a theme ■ Delaware LLCs – a spent case ? ■ Nongrantor Trusts – strategic planning opportunities
10:45 am	**Networking refreshments**
11:15 am	**Case study in respect of the use of trusts – Trustees as shareholders in a family business** *John Riches TEP, STEP Public Policy, UK* *Mark Bridges TEP, Farrer & Co LLP, UK* *Nick Jacob TEP, Lawrence Graham LLP, UK* *James Aitken TEP, HSBC Trustee (Singapore) Ltd, Singapore* ■ Dividend policy ■ Employment of family members ■ Interaction between trustees and directors ■ Voting control ■ How to be fair between beneficiaries ■ Who is to retain control? **Session kindly sponsored by Rawlinson & Hunter**
12:05 pm	**Panel session on succession law issues** *Richard Frimston TEP, Chair of Cross-Border Estates Group, Russell Cooke LLP, UK* *Edmund Leow, Baker & McKenzie LLP, Singapore* ■ Common law v Civil law jurisdictions ■ Religious based and other jurisdictions ■ Forced heirship and other succession law requirements ■ Brussels IV in Europe
12:45 pm	**Lunch** **Kindly sponsored by Rawlinson & Hunter**
2.00 pm	**Panel session on the contribution that the offshore financial centres make to higher tax jurisdictions** *Richard Hay TEP, Stikeman Elliott, UK (Chair)* *Yeoh Lian Chuan TEP, Rajah & Tann LLP, Singapore* *Gurbachan Singh TEP, KhattarWong, Singapore* *Jonathan Hooley, States of Guernsey, Guernsey* *Prof. Jason Sharman, Centre for Governance & Public Policy, Griffith University, Queensland, Australia*
2:40 pm	**Breakout sessions – Choose 1 from the 4 concurrent options as stated below:**
	Option 1 – Succession law case study using trusts **(follow up from earlier panel session)** *Richard Frimston TEP, Chair of Cross-Border Estates Group, Russell-Cooke, UK* *Edmund Leow, Baker & McKenzie LLP, Singapore*
	Option 2 – Purpose Trusts, STAR Trusts and VISTA Trusts – **How can they be best used?** *Raymond Gwee TEP, UBS Trustees, Singapore* *Simon Beck TEP, Baker & McKenzie LLP, Miami*
	Option 3 – Foundations and trusts. How to decide which to use? *Robert Kirkby, Jersey Finance, Jersey* *Paul Hodgson, Butterfield Trust (Guernsey) Limited, Guernsey* *Mark Bridges TEP, Farrer & Co LLP, London*
	Option 4 – Family Business – Working with the next generation **(follow up from earlier talk on shareholders in family business)** *Bill Ahern TEP, Family Capital Conservation Limited, HK* *James Aitken TEP, HSBC Trustee (Singapore) Ltd, Singapore*
3.25 pm	**Networking and refreshments** **Change of breakout sessions**
3:55 pm	**Breakout sessions repeated – Choose 1 from the 4 concurrent options as stated below:**
	Option 1 – Succession law case study using trusts **(follow up from earlier panel session)** *Richard Frimston TEP, Chair of Cross-Border Estates Group, Russell-Cooke, UK* *Edmund Leow, Baker & McKenzie LLP, Singapore*
	Option 2 – Purpose Trusts, STAR Trusts and VISTA Trusts – **How can they be best used?** *Raymond Gwee TEP, UBS, Singapore* *Simon Beck TEP, Baker & McKenzie LLP, Miami*
	Option 3 – Foundations and trusts – How to decide which to use? *Robert Kirkby, Jersey Finance, Jersey* *Paul Hodgson, Butterfield Trust (Guernsey) Limited, Guernsey* *Mark Bridges TEP, Farrer & Co LLP, London*
	Option 4 – Family Business – Working with the next generation **(follow up from earlier talk on shareholders in family business)** *Bill Ahern TEP, Family Capital Conservation Limited, HK* *James Aitken TEP, HSBC Trustee (Singapore) Ltd, Singapore*
4:40 pm	**Debate – Gordon Brown & Nicolas Sarkozy are right –** **"Tax havens really are finished"** Chair – Peter Niven, Guernsey Finance, Guernsey For – Richard Hay TEP, Stikeman Elliott, UK Against – David Brownbill QC TEP, UK
5:25 pm	**Conference Close – Chairman of STEP Singapore**
6:00 pm	**Farewell Cocktails and Dinner** **Long Bar Steakhouse, Raffles Hotel** **Kindly sponsored by Charles Monat**

DATE FOR DIARY

STEP Foundation Certificate and Diploma in International Trust Management

3 November 2009, Singapore

09:00–13:00

This programme provides a recognised professional qualification for those already working within the trusts and estates field, or those wishing to move to a position within the field.

To hear more about the STEP Foundation Certificate and Diploma in International Trust Management, please come along to this information session.

For a full course syllabus, venue details and to attend this session, please email cltstep_registrar@centlaw.com

www.step.org/education www.clt-stepint.co.uk