

## SWITZERLAND – A NEW MEMBER OF THE TRUST COMMUNITY

FTSE Room, Level 9, Capital Tower, 168 Robinson Road  
20 November 2007 (Tuesday) • 12.00-2.00pm

## About this Seminar

STEP Singapore is pleased to have Mr. Tim Urquhart, Chairman of STEP Switzerland speak at this continuing professional development seminar on the following issues:

1. the changes that have been made in Switzerland to both law and regulation following the ratification of the Hague Treaty
2. issues relating to taxation in Switzerland for Residents, Non-residents and Companies.

We welcome all members and practitioners in the trust industry to join us for this update, followed by a standing buffet lunch.

## Seminar Programme

11.45-12.00pm	<b>Registrations &amp; Refreshments</b>
12.00-12.05pm	<b>Opening Remarks &amp; Overview by Chairperson:</b> <i>Mr. Bill Lexmond - President, STEP Singapore</i>
12.05-1.00pm	<b>Switzerland - A New Member of the Trust Community</b> <i>Mr. Tim Urquhart - Chairman, STEP Switzerland</i>
1.00-1.20pm	<b>Q&amp;A Session &amp; Closing Remarks</b>
1.20-2.00pm	<b>Standing Buffet Lunch</b>

## About the Chairperson

**Mr. Bill Lexmond - Managing Director of Wealth Planning, UBS AG; President, STEP Singapore**

Bill Lexmond is the Managing Director of Wealth Planning for UBS in Asia Pacific. Bill has been living in Asia since 1989, arriving in Singapore in 1994. He studied in Canada at University of Waterloo (Mathematics) and Queen's University (Law). He has been involved in trusts and taxation matters for over 20 years, in Canada and in Asia. In Singapore, prior to joining UBS in 2004, Bill was with PricewaterhouseCoopers for 7 years and Citibank for 2 1/2 years. Bill is currently the Singapore Chair of the Society of Trust and Estate Practitioners and is on the Board of the Singapore Branch of the International Fiscal Association. Bill has spoken at and/or chaired many seminars in Asia, including the very successful inaugural STEP Asia Conference held in Singapore October 2005.

## About the Speaker

**Mr. Tim Urquhart - Chairman, STEP Switzerland**

Tim Urquhart practised as a Solicitor for 23 years in England having been made a partner in an English firm in 1971, and during that time was primarily responsible for the creation and development of the firm's European Practice, initially in France (in 1990 he became the partner-in-charge of the French unit ) and thereafter in Denmark, Belgium and Germany.

Tim's practice specialised in advising both private individuals and large corporations on the cross-border aspects of taxation and the use of tax efficient structures in private wealth planning and corporate investment.

Having retired from practice in 1994, Tim joined Rothschild Trust in Switzerland where he held the office of Managing Director of the Swiss Trust Group until October 2001, when he became the Chief Executive Officer and a member of the Executive Board of the Rothschild Bank in Switzerland. He held both positions until December 2006 when at his request Tim relinquished his operational responsibilities to become Chairman of the Trust Group.

During the last two decades years Tim has lectured extensively in both English and French in particular on the taxation aspects of onshore and offshore Trusts and their use in asset protection, wealth and succession planning and investment in different jurisdictions.

## REGISTRATION FORM

Name (Dr/Mr/Mrs/Miss/Mdm): \_\_\_\_\_

Name and Address of Organisation: \_\_\_\_\_

STEP Membership No: \_\_\_\_\_ Position in Organisation: \_\_\_\_\_

Tel number: \_\_\_\_\_ Fax number: \_\_\_\_\_ Email: \_\_\_\_\_

(A valid email address is required for confirmation of registration.)

MEMBERSHIP (Please circle as appropriate.)	FEES
Members of STEP, CPA Australia, International Fiscal Association (IFA), International Tax Planning Association (ITPA), Law Society of Singapore, Singapore Corporate Counsel Association (SCCA), STA (Singapore Trustees Association), Singapore Association of the Institute of Chartered Secretaries and Administrators (SAICSA)	<b>S\$40.00</b>
Others	<b>S\$70.00</b>

- STEP Member   
  CPA Australia Member   
  IFA Member   
  ITPA Member   
  Law Society Member  
 SAICSA Member   
  SCCA Member   
  STA Member   
  Others

Mode of payment:  Cheque     Telegraphic Transfer

## Telegraphic Transfer Details:

Account Name: STEP (Singapore Chapter)    Account Number: 048-017070-6    SWIFT code: DBSSGSG  
 Bank Details: DBS Bank    Address: Raffles Place Branch, 22 Malacca Street, #01-00 Royal Brothers Building, Singapore 048980.  
 Please email [secretariat@step.org.sg](mailto:secretariat@step.org.sg) after the T/T has been done for our follow-up with the bank. Registration fees must be received nett of all bank charges.

## Cheque Details:

Cheque payments should be made payable to "STEP (Singapore Chapter)" & arrive at our office at "77A Boat Quay Singapore 049865" with the completed registration form on or before the closing date, **Tuesday, 13 November 2007.**

For further enquiries, please contact: STEP (SINGAPORE) SECRETARIAT

Tel: (65) 6225 2393    Fax: (65) 6557 2751    E-mail: [secretariat@step.org.sg](mailto:secretariat@step.org.sg)    Website: [www.step.org.sg](http://www.step.org.sg)

## REGISTRATION, REFUND &amp; CANCELLATION POLICY

1. Registrations will be confirmed upon receipt of full payment accompanied by a duly completed registration form.
2. The Organisers reserve the right to refuse to register or admit any participant, and to cancel or postpone the course.
3. Equivalent substitute delegates are welcomed, subject to the Organisers being notified at least 2 working days before the course of the substitute delegate.
4. The Organisers will not entertain any request for a refund of fees. However a confirmed registrant who has paid in full the course fees but does not turn up for the course will be entitled to collect a set of the materials provided.