

Transcontinental Trusts: International Forum

3-5th June 2020, Bermuda

Pre-Conference

3rd June 2020

19.00 Welcome BBQ at the Princess Hamilton Marina

Conference Day One

4th June 2020

08.00 *Conference Registration*

08.30 **Breakfast Briefings**

Briefing A

Swiss Trust Regulation

David Wallace Wilson

Partner

Schellenberg Wittmer Ltd

Briefing B

A Roadmap to Settling in Bermuda

09.00 *Conference Welcome Refreshments*

09.20 **Chairmen's Opening Remarks**

Jonathan Conder

Partner

Macfarlanes

Basil Zirinis

Partner

Sullivan Cromwell

09.30 **Opening Welcome From the BDA**

09.35 **Minister of Finance Welcome**

09.40 **Keynote - Global Economic & Geopolitical Outlook: Implications for the Private Client**

10.25 Where Should I settle?

Sara (a fictitious high-net-worth individual) is considering what Jurisdiction to settle in. On the table are **UK, US, Italy and Switzerland**. What are the pros and cons of each?

Nicola Saccardo
Partner
Maisto e Associati

11.10 Morning Refreshment Break
11.40 Global Litigation Round-Up

Joshua S. Rubenstein
Partner
Katten Muchin Rosenman LLP

Keith Robinson
Partner
Carey Olsen LLP

Gilead Cooper QC
Barrister
Wilberforce Chamber

12.20 DAC6: Signalling a Brave New World for Transparency?
13.00 Extended Lunch
AFTERNOON BREAKOUT SESSIONS

Stream 1 Where Should I Settle? Sara digs deeper into two jurisdictions	Stream 2 Litigation	Stream 3 New Generation
14.10 <i>Moderator's Opening Remarks</i>	<i>Moderator's Opening Remarks</i>	<i>Moderator's Opening Remarks</i>
14.20 UK	Trends and Insights on Litigation Funding	Reflecting the Priorities of the New Generation
14.50 US	Firewall Provisions in Matrimonial Disputes Dawn Goodman Partner <i>WithersWorldwide</i>	Working with Emerging Non-traditional Families

15.20 <i>Moderators' Closing Remarks</i>	<i>Moderators' Closing Remarks</i>	<i>Moderators' Closing Remarks</i>
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15.30 *Afternoon Refreshment Break*

16.00 **Anti-Bartlett Clauses: Normal Service Resumed?**

Jonathan Speck
Partner
Mourant

Alison Dyer
Managing Director
Estera

16.40 **Embracing ESG: Impact Investing, Philanthropy and Beyond**

17.20 **Chairmen's Summation**

Jonathan Conder
Partner
Macfarlanes

Basil Zirinis
Partner
Sullivan Cromwell

17.30 *Close of Conference Day One*

18.30 *Beach Party*

20.00 *Extended Dinner*

Conference Day Two

08.30 **Breakfast Briefings**

Briefing A
Capacity: Handling with Care

Briefing B
Use of Mutual Funds by Families

Gary Heynes
Partner, Head of Private Client
RSM UK

09.00 *Conference Welcome Refreshments*

09.30 **Chairmen's Opening Remarks**

09.40 **Keynote: Perspectives on Building A Career in Private Wealth**

Line-Alexa Glotin
Partner
UGGC Avocats

10.20 **Where Should I Locate My Structures?**

Having settled in the UK, Sara is now pondering where she should locate her structures. **US, Bermuda, Switzerland or Channel Island**

11.00 *Morning Refreshment Break*

11.30 **Use and Abuse of Trustee Powers**

Moderator
Elsbeth Talbot Rice QC
Barrister
XXIV Old Buildings

12.10 **Trusts & Injunctions**

Moderator:
Beatrice Puoti, Partner, **Burges Salmon**

12.50 *Extended Lunch*

AFTERNOON BREAKOUT SESSION

Stream 1
Where Should I Locate My Structures?
Sarah digs deeper into two jurisdictions

Stream 2
2020 and Beyond: Challenges for Trustees

Stream 3
Beyond Trusts

14.00 <i>Moderator's Opening Remarks</i>	<i>Moderator's Opening Remarks</i>	<i>Moderator's Opening Remarks</i>
14.10 US	Innovation or Disruption on the Horizon?	Exploring Alternative Structuring Options (Including Investment Holding Companies & Foundations)
14.40 Bermuda (or Cayman or Bahamas?)	Data & Information Management: Risks & Opportunities	
15.10 <i>Moderators' Closing Remarks</i>	<i>Moderators' Closing Remarks</i>	<i>Moderators' Closing Remarks</i>

15.20 *Networking: Afternoon Refreshment Break*

15.50 **Key Trends and Developments in Latin America: Four Jurisdictions Reviewed**

Michael Silva
Global Head Private Client
DLA Piper

16.30 **The International Private Client World: Lessons Learnt & Conference Takeaways**

Georgina James
Partner
Farrer

17.00 **Close of Conference & Final Remarks from the Chairs**

Jonathan Conder
Partner
Macfarlanes

Basil Zirinis
Partner
Sullivan Cromwell

17.20 *Farewell Drinks Reception*