



STEP Global Congress

6-7 November 2014

Mandarin Oriental Hotel, Miami, USA

Powerful, thought-provoking agenda includes:

- Decision making and risk in private wealth
- Harmony and dis-harmony of private international law
- Supranational initiatives
- Asset recovery and litigation
- Trusts in civil law jurisdictions
- Digital assets – coping with death and incapacity
- Complex tax structures

And so much more, see inside for full details.

A world-class technical programme, giving you the opportunity to network and exchange ideas with practitioners from STEP's global community

Plus..

Specialised sessions from our SIGs (Special Interest Groups) who play a major part in this programme

Focused SIG themes include:

- Business families
- Philanthropy
- Cross border estates
- Mental capacity
- Contentious trusts and estates

Keynote Speakers:

Geoffrey Robertson QC,

Doughty Street Chambers, UK

John G. Taft,

CEO, RBC Wealth Management, USA

**Early
bird
rate!***

Save up to \$400

	Early bird rate*	Normal rate
STEP Members	\$1,800	\$2,100
Non-members	\$2,200	\$2,600

*early bird rate applies until 30 June 2014

Sponsors include

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Conference language: English

Programme

WEDNESDAY 05 NOVEMBER 2014

2.00pm Conference registration and hospitality desk opens

6.00pm Opening night cocktail party
Mix and mingle ahead of the Congress at the welcome cocktail party in the marquee on the tropical lawns of the Mandarin Oriental



DAY ONE

THURSDAY 06 NOVEMBER 2014

8.15am Registration and refreshments
Exhibits open

9.00am Introduction from Chair of STEP Worldwide

9.10am Welcome from STEP Miami
Hal J. Webb TEP, Chair STEP Miami Branch

9.15am Keynote Address 1

The principles of good stewardship

- The choice for service
- Whose interest are we serving?
- Lessons from a lifetime in banking

John G. Taft, RBC Wealth Management, USA

9.45am Main Stage Session 1

Decision-making and risk in private wealth

- Some disasters and how they happened
- The subjective perception and estimation of risk
- Why do clever people do foolish things?
- Common sense and its place in trust law

Robert Hunter, Herbert Smith Freehills LLP, UK

10.30am Networking and refreshments

11.00am Special Interest Group Sessions

Option 1 – Business Families and Philanthropy Special Interest Groups: Building philanthropy in the fabric of the family enterprise

Kecia Barkawi TEP, VALUEworks, Switzerland
Paul Stibbard TEP, Rothschild Trust, UK

Option 2 – Mental Capacity Special Interest Group: Digital assets – coping with death and incapacity

Julia Abrey TEP, Withers LLP, UK
Suzanne Brown Walsh, Cummings & Lockwood LLC, USA

Option 3 – Contentious Trusts and Estates and Cross-Border Estates Special Interest Groups: Forced heirship/community property and offshore trusts

Chair: *Simon Beck TEP, Baker & McKenzie LLP, USA*
Gilead Cooper QC, 3 Stone Buildings, UK
Professor Jonathan Harris TEP, Serle Court Chambers, UK
Basil Zirinis TEP, Sullivan & Cromwell LLP, USA

Option 4 – International Faculty: Survey of the key international data collection programmes

Chair: *Richard Hay TEP, Stikeman Elliott LLP, UK*
George Hodgson, STEP Worldwide
Mark Matthews, Caplin & Drysdale, USA
Bruce Zagaris TEP, Berliner, Corcoran & Rowe LLP, USA

12.15pm Lunch

1.45pm Special Interest Group Sessions

Option 1 – Business Families Special Interest Group: Comparative tax treatments of selected family businesses and key jurisdictions

Stanley A. Barg TEP, Kozusko Harris Duncan, USA
Mauricio Cano de Valle TEP, Brook & Cano, Mexico

Option 2 – Mental Capacity Special Interest Group: End of life – how should the law support and encourage an individual's choices?

Kenneth W. Goodman, University of Miami, USA
Patricia Wass TEP, Foot Anstey LLP, UK

Option 3 – Philanthropy Advisors Special Interest Group: New philanthropy tools – making a return while making a difference

James Carleton, Farrer & Co LLP, UK
Atiya Weiss, JP Morgan, USA

The STEP Global Congress is more than just a conference. Find out more about our exciting social events at www.stepglobalcongress.org

Register online today at www.stepglobalcongress.org



Option 4 – Cross-Border Estates Special Interest Group: The international family – The impact of the European Succession Regulation (Brussels IV) inside and outside Europe

Richard Frimston TEP, Russell-Cooke LLP, UK

Option 5 – Contentious Trusts and Estates Special Interest Group: The client's perspective on trust and estate litigation

*Chair: Toby Graham TEP, Farrer & Co, UK
Dr Hubert Achermann, Lunag AG, Switzerland
Dr Georgia Fotiou TEP, KPMG AG, Switzerland*

Option 6 – International Faculty: Government use of data

*Chair: Richard Hay TEP, Stikeman Elliott LLP, UK
Geoff Cook TEP, Jersey Finance Limited, Jersey
Nick Jacob TEP, Lawrence Graham LLP, UK
Mark Matthews, Caplin & Drysdale, USA*

DAY TWO

FRIDAY
07
NOVEMBER
2014

2.50pm Main Stage Session 2

The harmony and dis-harmony of private international law

*Chair: Professor Donovan Waters QC TEP, Horne Coupar, Canada
Professor Jonathan Harris TEP, Serle Court Chambers, UK
Professor Jeffrey Schoenblum, Vanderbilt University, USA*

3.50pm Networking and refreshments

4.20pm Main Stage Session 3

Supranational initiatives:

- The G8 and G20 agendas
- Transparency and beneficial ownership
- Unacceptable tax avoidance
- Automatic exchange of information
- What it all means for the wealth management industry

*Monica Bhatia, OECD, France
John Riches TEP, RMW Law LLP, UK*

5.20pm Day 1 closing address

6.00pm Reception and dinner

Join us for drinks and a BBQ dinner in a relaxed setting with a Miami vibe.



8.00am Registration and refreshments
Exhibits open

8.00am BNY Mellon Wealth Management Breakfast Briefing
Wealth planning for foreign nationals with U.S. connections

Amicorp Breakfast Briefing
Panel discussion

8.55am Welcome from STEP CEO
David Harvey, STEP Worldwide

9.00am Keynote Address 2

Privacy – who guards its guardians?

- Why does every human rights convention proclaim the need to protect privacy?
- What justification, if any, is there for the leaks of government secrets by Julian Assange and Edward Snowden, and how does this compute with governments actively procuring leaks of private information from banks and threatening the professional confidence of bankers, lawyers and accountants?
- If 'public interest' is to replace 'iniquity' as the legal basis for justifiable disclosure, how and by whom is this broad concept to be defined and enforced?

Geoffrey Robertson QC, Doughty Street Chambers, UK

9.45am Main Stage Session 4

Addressing the real needs of our clients: The need for transparency and dialogue with 'onshore' tax authorities

- Developments in exchange of information and anti-money laundering rules
- Secure ways for global wealth owners to hold their wealth and to ensure succession strategies that are designed to address the real needs of the family
- Have members of STEP done enough to help guide onshore tax authorities on how best to address concerns about tax evasion and appropriate information exchange?
- Is a defensive approach to change the right way to achieve what STEP should achieve?

Philip Marcovici TEP, Offices of Philip Marcovici, Hong Kong

Register online today at www.stepglobalcongress.org

For full details of each session, visit
www.stepglobalcongress.org

10.30am	Main Stage Session 5
	<p>STEP's response to the emerging transparency agenda Balancing the needs of the clients and the Society <i>George Hodgson, STEP Worldwide</i></p>
11.00am	Networking and refreshments
11.30am	Special Interest Group Sessions
	<p>Option 1 – Business Families Special Interest Group: Harvard Business School meets Confucius – the family dimension <i>Mary Duke TEP, Family Wealth Advisor, USA</i> <i>Nicolas Malumian TEP, Malumian & Fossati, Argentina</i> <i>Paul Stibbard TEP, Rothschild Trust, UK</i></p>
	<p>Option 2 – Mental Capacity & Cross-Border Estates Special Interest Groups: Multi-jurisdictional assets – challenges for estate planning and dealing with mental incapacity <i>Margaret O'Sullivan TEP, O'Sullivan Estate Lawyers, Canada</i> <i>Joshua Rubenstein TEP, Katten Muchin Rosenman LLP, USA</i></p>
	<p>Option 3 – Philanthropy Advisors Special Interest Group: Philanthropy in the global village <i>Betsy Brill TEP, Strategic Philanthropy Ltd, USA</i> <i>Clive Cutbill TEP, Withers LLP, UK</i></p>
	<p>Option 4 – Contentious Trusts and Estates Special Interest Group: Trustee investment – what the common-law world can learn from Uncle Sam <i>Nicholas Le Poidevin QC TEP, New Square Chambers, UK</i> <i>Basil Zirinis TEP, Sullivan & Cromwell LLP, USA</i></p>
	<p>Option 5 – International Faculty: Finance centres 2020 – how will service provider business models evolve to cope with transparency? Chair: <i>Richard Hay TEP, Stikeman Elliott LLP, UK</i> <i>Peter Cohen TEP, IF Consulting Services LLC, USA</i> <i>Geoff Cook TEP, Jersey Finance Limited, Jersey</i> <i>John Riches TEP, RMW Law LLP, UK</i></p>
12.45pm	Lunch
2.15pm	Specialist Sessions
	<p>Option 1 – US/Canadian tax developments: Discussion of the issues and opportunities for planning involving cross-border US/Canada families <i>Joseph Kellogg TEP, WE Family Offices, USA</i> <i>Kim G C Moody TEP, Moodys Gartner Tax Law LLP, Canada</i> <i>Michael Pfeifer TEP, Caplin & Drysdale Attorneys, USA</i></p>

	<p>Option 2 – Latin America update <i>Dayra Berbey de Rojas TEP, Icaza Trust Corporation, Panama</i> <i>Mauricio Cano del Valle TEP, Brook & Cano, Mexico</i> <i>Nicolas Malumian TEP, Malumian & Fossati, Argentina</i> <i>Flavia Moreira de Campos Andrade TEP, Tozzini Freire Advogados, Brazil</i></p>
	<p>Option 3 – Complex tax structures <i>Nick Jacob TEP, Lawrence Graham LLP, UK</i> <i>David Wallace Wilson TEP, Schellenberg Wittmer, Switzerland</i></p>
	<p>Option 4 – Asset recovery and litigation panel session <i>Andrew Lourie, Kobre & Kim LLP, USA</i> <i>Tim Prudhoe TEP, Kobre & Kim LLP, BVI</i> <i>Domingos Fernando Refinetti, Stocche Forbes, Brazil</i></p>
	<p>Option 5 – Trusts in some civil law jurisdictions <i>Dr Max Ganado, Ganado Advocates, Malta</i> <i>Dr Ákos Menyhei TEP, Hajdu & Menyhei Attorneys at Law, Hungary</i> <i>Diana Palomba TEP, Ingad Trust, Italy</i> <i>Marilyn Piccini Roy, Borden Ladner Gervais LLP, Canada</i></p>
	<p>Option 6 – Cyber-security for you and your clients in the digital age Chair: <i>Bill Ahern TEP, Family Capital Conservation, Hong Kong</i> <i>Thomas Parenty, Cyber Security Consulting LLC, USA</i> <i>Paul Stibbard TEP, Rothschild Trust, UK</i></p>
3.35pm	Main Stage Session 6
	<p>Are you on the endangered species list? Challenging old-guard thinking</p> <ul style="list-style-type: none"> • The long-term demographic of the client base • The need for client centricity and trust; do we have it today? • The millennial generation – the next generation of clients: their take on us <p><i>Aron Pervin TEP, Pervin Family Business Advisors Inc, Canada</i> <i>Bruce Weatherill, Bruce Weatherill Executive Consulting Limited, UK</i></p>
4.20pm	Networking and refreshments
4.45pm	Main Stage Session 7
	<p>The great debate Interactive session including live polling/voting</p>
5.30pm	Conference close
6.00pm	<p>Farewell beach party End your Congress experience on the private white-sand beach of the Mandarin Oriental, overlooking Biscayne Bay. Grab a drink, kick off your shoes and get ready for a fun evening of music, great food and flowing drinks!</p> 

Register online today at www.stepglobalcongress.org

The inaugural STEP Congress brings together all those interested in the world of family inheritance and succession planning, from all over the globe. Attendees will include thought-leaders and industry experts, made up of both STEP members and non-members. With a world-class technical programme and the opportunity to network and exchange ideas, this is an event not to be missed!

The powerful, thought-provoking agenda encourages the exchange of ideas, knowledge and learning. The different programme streams range from the highly topical, international subject areas, to specialised sessions from our Special Interest Groups, so you can build your agenda around the areas that interest you.

The excellent social events also offer attendees the time to network with peers and partner organisations, providing extensive business opportunities. Speakers will not just be drawn from practitioners but will include prominent external commentators sharing ideas, criticism, business insight and new analysis about our world.

We look forward to welcoming you to what is sure to be an outstanding two days of learning, sharing and networking.

David Harvey, CEO, STEP

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Keynote Speakers' Biographies

This conference features more than 40 renowned international speakers, with keynote sessions from:

Geoffrey Robertson QC, Doughty Street Chambers, UK

Geoffrey Robertson QC is founder and head of Doughty Street Chambers, one of Europe's largest human rights practices. He has had a distinguished career as a trial and appellate counsel, and has served as a UN Appeals Judge and as a 'distinguished jurist' member of the UN's Justice Council. He has argued many landmark cases in media, constitutional and criminal law in the European Courts of Justice and of Human Rights, in the Privy Council and the Supreme Courts of the UK and of many Commonwealth countries. He has been involved in the prosecutions of General Pinochet and Hastings Banda and the defence of Salman Rushdie, Mike Tyson and Julian Assange. He was counsel for the trustees in the notable case of *Bacardi & de Juria v Patron Tequila* which after numerous visits to the Privy Council from Anguilla resulted in a \$550 million settlement in favour of his clients.

John G. Taft, RBC Wealth Management, USA

John G. Taft is CEO of RBC Wealth Management. He served as chairman-elect for the Securities Industry and Financial Markets Association (SIFMA) in 2010 and chairman in 2011. As a representative of SIFMA, John advocated for responsible financial reform and testified before Congress in support of a federal fiduciary standard of care for investment professionals who provide advice to individual clients. An active diversity advocate around issues of gender identity, John serves as executive sponsor for RBC WM – U.S.'s Gay, Lesbian, Allied and Diverse Employees (GLADE) employee resource group. Under his leadership, RBC WM – U.S. received a 100 per cent rating in the Human Rights Campaign's Corporate Equality Index. In 2010, the National Gay & Lesbian Chamber of Commerce (NGLCC) named John the 'Outstanding Corporate Diversity Leader.'

To view all of the speakers' biographies, please visit www.stepglobalcongress.org

About the Organisers

STEP is the worldwide professional association for practitioners dealing with family inheritance and succession planning. The Society helps to improve public understanding of the issues families face in this area and promotes education and high professional standards among its members. STEP has 19,000 members across 80 jurisdictions from a broad range of professional backgrounds, including lawyers, accountants, trust specialists and other practitioners in this area. STEP members help families plan for their futures, specialising in a wide range of activities, from drafting a relatively simple will to more complex issues surrounding international families, protection of the vulnerable, family businesses and philanthropic giving.

For more information about STEP, visit www.step.org or email step@step.org

For any queries please contact the conference team on +44 (0)20 7340 0500 or email conferences@step.org

For the detailed conference programme and to register to attend, visit www.stepglobalcongress.org

Join a STEP Special Interest Group (SIG) for free today!

Our SIGs offer a forum for shared specialisms and focused areas of practice. SIGs include:

- Business Families
- Charities
- Contentious Trusts and Estates
- Cross-Border Estates
- Mental Capacity
- Philanthropy Advisors

Find out more at www.step.org/sigs

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