

# Swiss and Liechtenstein STEP Federation Alpine Conference

3-4 May 2023

Congress Centre Kursaal Interlaken

## EARLY BIRD DISCOUNT

Secure your place by **10 March 2023**  
and save 100 CHF with our early bird rate.

[Register now](#)

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## Day one - 3 May 2023

**Registration, breakfast and networking**

**10:00 CEST**

Exhibits open

## Welcome from Swiss and Liechtenstein STEP Federation and Chair's opening remarks

10:40 CEST

### Speaker

Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland



Andrew McCallum  
TEP

## Welcome from STEP Worldwide

10:50 CEST

### Speaker

Mark Walley, CEO of STEP Worldwide



Mark Walley

## Keynote address

11:00 CEST

## Economy and finance

11:30 CEST

### Speakers

Daniel Witschi, Chief Investment Officer, Dreyfus Sons & Co. Ltd, Banquiers, Switzerland



Daniel Witschi

## Swiss and Liechtenstein STEP Federation - Student awards

12:15 CEST

Dr Johanna Niegel TEP, Vice Director, Allgemeines Treuunternehmen (ATU), Liechtenstein

Filippo Turato TEP, Member of the Executive Committee, Capital Trustees AG, Switzerland



Dr Johanna Niegel  
TEP



Filippo Turato TEP

## Lunch

**12:30**  
**CEST**

## Swiss update: Succession law, trust law, FinIA and AML

**13:45**  
**CEST**

### Moderator

Philippe de Salis TEP, Stonehage Fleming S.A. (Neuchatel)

### Speakers

Nicolas Gillard, Lawyer (Partner), Kellerhals Carrard Lausanne Sion SA, Switzerland

Florence Guillaume, Professor of Private International Law, Founder of the LexTech Institute, University of Neuchâtel

Dorothee Ignatz, Senior Specialist, Portfolio Managers and Trustees, FINMA, Switzerland

Laura Tscherrig, Head Portfolio Managers and Trustees, Swiss Financial Market Supervisory Authority FINMA, Switzerland



Florence Guillaume



Dorothee Ignatz



Laura Tscherrig

## A focus on Liechtenstein: Succession planning over generations: Sustainability, ESG and regulatory environment

**14:45**  
**CEST**

### Moderator

H.S.H. Prince Michael of Liechtenstein, Executive Chairman, Industrie- und Finanzkontor Ets., Liechtenstein

### Speakers

Dr. Reto Degen, Member of the Executive Board, Financial Market Authority, Liechtenstein  
Ursula Finsterwald, Head Group Sustainability Management, LGT Group Holding, Liechtenstein  
Dr. Johannes Gasser TEP, attorney and notary public, senior partner, Gasser Partner, Attorneys at Law, Liechtenstein



H.S.H. Prince  
Michael of  
Liechtenstein



Dr. Reto Degen;  
LL.M



Ursula Finsterwald



Dr. Johannes  
Gasser TEP

## Networking and refreshments

**15:45  
CEST**

*Kindly sponsored by Dr. Ariel Sergio Davidoff, LL.M. at LINDEMANNLAW*

## Trust law update: Recent cases, litigation and arbitration

**16:15  
CEST**

### Moderator

Richard Wilson KC TEP, Serle Court Chambers

### Speakers

Paul Stibbard TEP, Executive Vice Chairman, Sequent (UK) Limited, UK

David Wallace Wilson TEP, Partner, Schellenberg Wittmer, Switzerland



Paul Stibbard TEP



David Wallace  
Wilson TEP

## International legal and tax update

**17:00**

**Moderator**

Filippo Nosedà TEP, Partner, Mishcon de Reya LLP, UK

**Speakers**

Thierry Boitelle, Owner, BOITELLE TAX, Switzerland  
Rodrigo Castillo Cottin, Partner, Rimon PC, Colombia  
Marco Cerrato TEP, Partner, Maisto e Associati, Italy



Filippo Nosedà TEP



Thierry Boitelle



Rodrigo Castillo  
Cottin



Marco Cerrato TEP

**Day one round-up**

**17:45  
CEST**

**Speaker**

Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland



Andrew McCallum  
TEP

**Drinks reception**

**18:30  
CEST**

Victoria Jungfrau Grand Hotel, Interlaken

*Kindly sponsored by Charles Russell Speechlys*

**Gala dinner**

**19:30  
CEST**

Victoria Jungfrau Grand Hotel, Interlaken

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## Day two - 4 May 2023

**Breakfast and networking**

**08:00 CEST**

Exhibits open

## Chair's opening remarks

08:50  
CEST

### Speaker

Dr. Guillaume Grisel TEP, Vice-Chairman of the Swiss & Liechtenstein STEP Federation; Partner, Schellenberg Wittmer, Switzerland



Dr. Guillaume Grisel  
TEP

## Family office trends

09:00  
CEST

### Speakers

Francesco Carlo Giorcelli TEP, Senior Advisor, Capital Trustees AG, Switzerland

Dr. Roderik J. P. Strobl TEP, Managing Director, Leo Trust Switzerland AG, Switzerland



Francesco Carlo  
Giorcelli TEP



Dr. Roderik J. P.  
Strobl TEP

## Family governance: Family constitutions, PTCs and control of structures

09:45  
CEST

### Moderator

Felicity Keller TEP, J. Stern & Co (Switzerland) AG, Switzerland

### Speakers

Diana Chambers, President, The Chambers Group Sàrl, Switzerland

Prof. Dr. Nicole Conrad-Forker, Attorney at Law, ATAG Attorneys Ltd, Switzerland

Alice Martin, Partner, Charles Russell Speechlys AG, Switzerland



Diana Chambers

Prof. Dr. Nicole  
Conrad-Forker

Alice Martin

## Networking and refreshments

**10:45  
CEST**

## Holding and financing special assets: aircrafts, ships and artworks

**11:15  
CEST**

### Speakers

Marie-Laure Gassier, Senior Advisor Jets and Yachts, BNP Paribas,  
Switzerland

Dr. Hans-Ruedi Grob, Blum & Grob

Freya Stewart, CEO, Art Finance & Group General Counsel, The Fine  
Art Group, UK



Marie-Laure Gassier

## Wealth planning and immigration for entertainers and sportspersons

**12:00  
CEST**

### Speakers

Ralph Krieger, GPS Performance

Frédéric Neukomm, Lenz & Staehelin

Francesco Oliveti, Senior Wealth Planner, EFG Bank AG, Switzerland



Francesco Oliveti



**Lunch and networking**

**12:45  
CEST**

**Opening remarks**

**14:10  
CEST**

**Speaker**

Cyril Bouzguir TEP, Banking Economist, Dreyfus Sons & Co. Ltd, Banquiers, Member of the STEP Alpine conference organising committee, Committee member of STEP Basel



Cyril Bouzguir TEP

**Cyber security, data protection and trustee liability**

**14:15  
CEST**

**Moderator**

Charles Gothard, Partner, Macfarlanes LLP, UK

**Speaker**

Jacopo Crivellaro TEP, Partner, Baker McKenzie, Switzerland  
David Leeming, Partner, Hakluyt and Company, UK  
David Rosenthal, Partner, VISCHER AG, Switzerland



Charles Gothard



Jacopo Crivellaro  
TEP



David Rosenthal

**Networking and refreshments**

**15:15  
CEST**

## Great debate

15:45  
CEST

### Speakers

Charles Gothard, Partner, Macfarlanes LLP, UK

Florence Guillaume, Florence Guillaume, Professor of Private International Law, Founder of the LexTech Institute, University of Neuchâtel

Filippo Nosedà TEP, Partner, Mishcon de Reya LLP, UK

David Wallace Wilson TEP, Partner, Schellenberg Wittmer, Switzerland

Richard Wilson KC TEP, Serle Court Chambers



Charles Gothard



Florence Guillaume



Filippo Nosedà TEP



David Wallace  
Wilson TEP

## Final remarks and close

16:45  
CEST

### Speaker

Andrew McCallum TEP, Chair of the Swiss & Liechtenstein STEP Federation; Senior Partner, Rawlinson & Hunter (Switzerland) AG, Switzerland



Andrew McCallum  
TEP

Day  
one

Social  
events

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## Social events

**2 May 2023**

**18:00  
CEST**

**Pre-conference drinks**

**Victoria-Jungfrau Grand Hotel & Spa, Interlaken**

The Swiss & Liechtenstein STEP Federation invite you to attend a Pre-conference drinks reception on the eve of the 6th Swiss Alpine Conference. Get to know your fellow attendees and network over drinks at the Victoria-Jungfrau amid the glorious mountain scenery of the Bernese Oberland.

Please note this is included within the conference registration fee. Guests are welcome to attend at a fee of 100 CHF (to be confirmed during booking).

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**3 May 2023**

**18:30  
CEST**

## **Drinks reception and gala dinner**

**Victoria-Jungfrau Grand Hotel & Spa, Interlaken**

Join us at this sophisticated venue for the main night Drinks Reception & Dinner where you can mingle and network with fellow guests after the opening day of the Conference. The evening will comprise a seated served three course meal, where you will have the opportunity to meet key branch members, and get to know your fellow conference attendees.

Please note this is included within the conference registration fee. Guests are welcome to attend at a fee of 100 CHF (to be confirmed during booking).

*Drinks reception  
kindly sponsored by*

  
CharlesRussell  
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*Gala dinner kindly  
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