

HYBRID

ZURICH

TUESDAY, 19 NOVEMBER 2024 | 12:00 - 14:00

Panel Discussion - Is a Foundation an alternative to a Trust?

TOPIC

Is a Foundation an alternative to a Trust?

- What is the difference between a foundation and a trust?
- Are there advantages in using a foundation?
- In which situations are foundations typically used?
- Which jurisdictions are used for foundations?

PANEL HOST

Natalie Peter, Partner, Blum&Grob Rechtsanwälte AG www.blumgrob.ch

SPEAKERS

Nancy Chien, Partner, Bedell Cristin Jersey Partnership www.bedellcristin.com

Yann Mrazek, Managing Partner of M/HQ www.m-hq.com

Markus Wille, Partner, BWB LEGAL www.bwb.legal

SPEAKERS CV

NANCY CHIEN is head of Bedell Cristin's International Private Client practice. Nancy has over 20 years of legal experience in both the private client area as well as the corporate sphere. Nancy advises ultra-high net worth families, family offices and intermediaries from all over the world on all aspects of private client structuring including the use of trusts and foundations, as well as related corporate law issues (including where such vehicles are used for philanthropic purposes).

She has considerable experience with high value and complex family governance structures, including ones where the founders wish to retain a degree of control over their family assets. Nancy also advises regularly on matters involving family disputes and disputes between trustee and beneficiaries. She works closely with her litigation colleagues for matters which require a court application.

matters affecting onshore vehicles and service providers, including FATCA, the common reporting standard (CRS), economic substance and disclosure requirements.

YANN MRAZEK is the Managing Partner of M/HQ.

He chiefly focuses on private wealth and Intergenerational planning. He has vast experience advising successful individuals and entrepreneurial families with Middle Eastern exposure on implementing intergenerational wealth transfer strategies and structuring their operational assets and global wealth. He is regularly involved in the ongoing management of such structures – as a board member, council member, guardian or protector. He sits on the board of Ras Al Khaimah ICC as well as several regulated financial institutions.

Yann is recommended by all of Chambers & Partners Private wealth, Legal Week's Private Client Global Elite and Who's who legal private client.

He was the Chair of STEP Arabia from 2015 to 2018.

MARKUS WILLE is a partner at BWBLEGAL with his main areas of practice being corporate law, private clients, estate planning, dispute resolution and associated litigation. He practises as a lawyer in Liechtenstein for more than 20 years and has held judicial roles, including as a judge at the Liechtenstein Constitutional Court from 2008 to 2020. He joined BWBLEGAL as a partner in 2014.

NATALIE PETER, heads the private client team at Blum&Grob Attorneys at Law Ltd and advises private individuals on all tax matters. This includes in particular the preparation of tax returns, obtaining rulings from the tax authorities and analysing, designing and implementing tax efficient structures. She is highly experienced with the taxation of trusts and foundations as well as with the establishment of tax exempt nonprofit organizations. Furthermore, Natalie Peter is an experienced advisor in international administrative assistance matters.

STEP Office Zug

Corinne Graf

Administration/Events

VEREIN STEP SUPPORTER



LEO TRUST
— ZÜRICH SINCE 1980 —

STEP ZÜRICH CENTRE SUPPORTER

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SUPPORTER



LOMBARD ODIER
LOMBARD ODIER DARIER HENTSCH

Date

TUESDAY, 19 NOVEMBER 2024 | 12:00 - 14:00

Venue

HOTEL GLOCKENHOF ZÜRICH

Sihlstrasse 31

8022 Zürich

Switzerland

[link to venue](#)

CPD

1 hour towards CPD obligation

Fee

present Members 80.00 CHF

present Non-Members 100.00 CHF

present STEP Students 50.00 CHF

present Sponsors free of charge

on-line Members 40.00 CHF

on-line Non-Members 60.00 CHF

on-line STEP Students 30.00 CHF

on-line Sponsor free of charge

Timetable on-site

11.45 – 12.00 / Registration

12.00 – 13.00 / Talk & Questions

13.00 – 14.00 / Lunch & Networking

Timetable on-line


11.57 - 12.00 / Registration

12.00 - 13.00 / Talk & Questions


Link and Presentation will be provided in advance

Annulation

Booked places can be cancelled up to 24 hours before the event. Only cancellations made in due time

CATEGORY 

REGION 

MONTH 

THURSDAY, 17 OCTOBER 2024

Supervisory Jurisdiction and Arbitration in Trusts: Support for Administration and Dispute Resolution

TUESDAY, 29 OCTOBER 2024

GmbH & Co. KG: Steuerliche Behandlung und Stolperfallen aus Sicht Schweiz und Deutschland

WEDNESDAY, 30 OCTOBER 2024

NextGen Event - Speed Networking

WEDNESDAY, 13 NOVEMBER 2024

Regulatory Training for Trustees - Repetition

TUESDAY, 19 NOVEMBER 2024

Panel Discussion - Is a Foundation an alternative to a Trust?

THURSDAY, 05 DECEMBER 2024

Evento di Natale STEP Lugano - La Fondazione Mantello Filantropia

TUESDAY, 04 FEBRUARY 2025

WEDNESDAY, 07 MAY 2025

Swiss & Liechtenstein STEP Federation ALPINE CONFERENCE 2025

TUESDAY, 03 JUNE 2025

Save - the - Date Apéroveranstaltung Basel

[9] RESULTS | RESET FILTER



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