

All times in Atlantic Daylight Time (Bermuda Time)

Conference Day One

2nd September

08.00 **Conference Welcome: Your Digital Platform**

- Take some time to familiarise yourself with digital event features.
- Contact other from the people tab to set up 1 to 1 meeting and have your first video chats

09.00 **Chairmen's Opening Remarks – The State of Play Amid the Crisis**

Jonathan Conder

Partner

Macfarlanes

Basil Zirinis

Partner

Sullivan & Cromwell LLP

Session guest:

Suzanne Kingston

Consultant

Mills & Reeve

09.30 **BDA & Minister of Finance Welcome Address**

Lynessa Lightbourne

Business Development Manager

BDA

The Hon. Curtis L. Dickinson, JP, MP

Minister of Finance

Bermuda

09.50 **Where Should I settle?**

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

Moderator:

Sarah Cormack

Partner

Mills & Reeve LLP

Piers Master

Partner

Charles Russell Speechlys LLP

Bachir P. Karam
Partner
Sullivan & Cromwell LLP

Nicola Saccardo
Partner
Maisto E Associati

Philippe Pulfer
Partner
Walder Wyss Attorneys at Law

10.40 *Coffee Break – Round Table Group Video Chats*

- Take the opportunity to speak to others in the virtual conference room
- Turn your camera and mic on to start a conversation with those sat at your table
- To switch table and join another conversation double click on where you want to move to

Breakout Sessions

Stream 1 Where Should I Settle?	Stream 2 Litigation	Stream 3 Next Generation
<p>11.20 UK</p> <p>Moderator: Sarah Cormack Partner <i>Mills & Reeve LLP</i></p> <p>Jonathan Riley Partner <i>Fladgate</i></p> <p>Kathryn Bradbury Partner <i>Payne Hicks Beach</i></p>	<p>Use and Abuse of Trustee Powers</p> <p>Moderator: Elspeth Talbot Rice QC Barrister <i>XXIV Old Buildings</i></p> <p>John Machell QC Barrister <i>Serle Court</i></p> <p>Thomas Dumont QC Barrister <i>Radcliff Chamber</i></p> <p>Scott Pearman Director <i>Conyers Dill & Pearman</i></p>	<p>Reflecting the Priorities of the New Generation</p> <p>Moderator: Joanne Morse Director <i>Summit Trust International</i></p> <p>Michelle Wolfe Managing Director <i>Meritus Trust Company</i></p> <p>Jessica Henson Partner <i>Payne Hicks Beach</i></p> <p>Rose Chamberlayne Partner <i>Wiggin Osborne Fullerlove</i></p>

12.05 **US**

Stanley A. Barg
Partner
Kozusko Harris Duncan

Jay D. Rosenbaum
Partner
Nixon Peabody LLP

Lauren DeBellis Aviv
Managing Partner
Daniel Aharoni & Partners LLP

The “Top 5” things individuals can consider doing to avoid post death challenges to their planning

Nicole K. Mann
Partner
McDermott Will & Emery

Geoffrey Kertesz
Partner
BDB Pitmans

Working with Non-traditional Families

Michael Mylonas QC
Barrister
Serjeants’ Inn

12.45 **Lunch Break**

- Take some time to **visit our sponsors’ virtual stands**. Click on a sponsor logo to access content and chat with a representative.

13.45 **Global Litigation Round-Up**

Moderator
Rachael Reynolds
Partner
Ogier

Joshua S. Rubenstein
Partner
Katten Muchin Rosenman LLP

Richard Wilson QC
Barrister
Serle Court

Keith Robinson
Partner
Carey Olsen

14.30 **Digital Conference Launch Party**

- With Stream select the “Meritus Beach Party” option
- Turn your camera and mic on to start a conversation with those sat at your table
- To switch table and join another conversation double click on where you want to move to

15.30 **Day One Close**

Conference Day Two

3rd September

08.00 *Breakfast Meetups- Round Table Group Video Chats*

- Go to Stream to take the opportunity to speak to others in the virtual conference room
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09.00 **Chairmen's Opening Remarks**

Jonathan Conder

Partner

Macfarlanes

Basil Zirinis

Partner

Sullivan & Cromwell LLP

09.10 **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**

Moderator

Sonia Velasco

Partner

Cuatrecasas Gonçalves Pereira

Dina Kapur Sanna

Partner

Day Pitney

Peter Pearman

Director

Conyers

Stella Mitchell-Voisin

Managing Director

Summit Trust International

Paul Hodgson

Deputy Group Head of Trusts

Butterfield

10.00 Anti-Bartlett Clauses: Normal Service Resumed?

Moderator
Charlotte Fraser
Partner
Farrer

Clare Usher-Wilson
Deputy Managing Director
Summit Trusts

Alison Dyer
Managing Director - Bermuda
Ocorian

10.40 *Coffee Break – Round Table Group Video Chats*

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Breakout Sessions

Stream 1 Where Should I Locate My Structures? Sara digs deeper	Stream 2 Litigation	Stream 3 Beyond Trusts
<p>11.20 US</p> <p>Moderator: Sonia Velasco Partner <i>Cuatrecasas Gonçalves Pereira</i></p> <p>Katrina Robinson Director <i>Teton Trust Company</i></p> <p>Kevin Packman Partner <i>Holland & Knight</i></p>	<p>Capacity: Handling with Care</p> <p>Moderator: Tina Wüstemann Partner <i>Bär & Karrer AG Anthony</i></p> <p>Anthony Poulton Partner <i>Baker & McKenzie</i></p> <p>Michael Cash Partner <i>Penningtons, Manches, Cooper</i></p> <p>Constance McDonnell QC Barrister <i>Serle Court</i></p>	<p>Use of Mutual Funds by Families</p> <p>Gary Heynes Partner, Head of Private Client <i>RSM UK</i></p> <p>Manuel Hack Partner <i>RMS Luxembourg</i></p> <p>Art Giacosa Tax Principal <i>RSM US</i></p>

<p>12.05 Cayman Islands</p> <p>Moderator: Sonia Velasco Partner Cuatrecasas Gonçalves Pereira</p> <p>Robert Lindley Partner, Head of Cayman & BVI Private Client & Trust Conyers Dill & Pearman</p> <p>Fraser Allister Managing Associate Ogier</p>	<p>Firewall Provisions in Matrimonial Disputes</p> <p>Alex Carruthers Founding Partner Hughes Fowler Carruthers</p> <p>Gretchen Beall Schumann Partner Cohen Rabin Stine Schumann llp</p> <p>Dawn Goodman Partner Withers</p>	<p>Exploring Alternative Structuring Options</p> <p>Moderator: Nicholas Jacobs Partner Forsters</p> <p>Tom Wiese Lombard Senior Managing Director Lombard International</p> <p>Amy M. Staehr Partner Longs, Reimer, Winegar</p>
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12.50 **Lunch Break**

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

Grant Wilson
Chief Investment Officer
Asset Risk Consultants

Emilie Shaw
ESG Portfolio Director
Schroders

Dr Christopher Kaminker
Head of Sustainable Investment Research & Strategy
Lombard Odier

14.30 **Drinks Reception**

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15.30 **Day Two Close**

Conference Day Three

4th September

08.00 **Breakfast Meetups- Round Table Group Video Chats**

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09.00 **Chairmen's Opening Remarks**

Jonathan Conder

Partner

Macfarlanes

Basil Zirinis

Partner

Sullivan & Cromwell LLP

09.10 **Perspectives on Building A Career in Private Wealth**

Moderator

Line-Alexa Glotin

Partner

UGGC Avocates

Sara Schroter

General Counsel

Meritus

Jane Pearce

Global Head of Trust

Butterfield Trust

09.50 **Trusts & Injunctions**

Moderator

Beatrice Puoti

Partner

Burges Salmon

James Price

Partner

Stewarts Law

Richard Wilson QC
Barrister
Serle Court

Steven White
Partner
Appleby

10.30 **Coffee Break – Round Table Group Video Chats**

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Breakout Sessions

Stream 1 Jurisdiction Insights	Stream 2 Litigation	Stream 3 Regulation
<p>11.15 Bermuda</p> <p>Moderator: Michael Silva Partner McDermott, Will & Emery LLP</p> <p>Vanessa Schrum Partner, Group Head of Bermuda Private Client & Trusts Appleby</p> <p>Bradley Houlston Senior Associate Appleby</p>	<p>Court Intervention in Trust Administration</p> <p>Moderator: Nicole Buncher Senior Associate Clifford Chance</p> <p>Robert Pearce QC Barrister Radcliffe Chambers</p>	<p>DAC6: Signalling a Brave New World for Transparency?</p> <p>Piers Barclay Partner Macfarlanes</p> <p>Richard Hay Partner Stikeman Elliot</p> <p>Oliver Cooper Stikeman Elliot</p>
<p>12.00 Key Trends and Developments in Latin America</p> <p>Moderator: Michael Silva Partner McDermott, Will & Emery LLP</p> <p>Nicole Najjar Prado de Oliveira Partner Mattos Filho</p>	<p>Fixing Settlor and Trustee Mistakes</p> <p>Moderator: Nicole Buncher Senior Associate Clifford Chance</p> <p>Graeme Kleiner Partner Charles Russell Speechlys LLP</p>	<p>Swiss Trust Regulation</p> <p>David Wallace Wilson Partner Schellenberg Wittmer</p>

Camilo Cortes
Partner
Dentons & Cardenas

Mark Lindley
Partner
Boodle Hatfield

Javier Canosa
Partner
Canosa Abogados

Jen Fox
Partner
Ogier

12.45 **Lunch Break**

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

Georgina James
Partner
Farrer

Lynesha Lightbourne
Business Development Manager
BDA

Jonathan Conder
Partner
Macfarlanes

Basil Zirinis
Partner
Sullivan & Cromwell LLP

14.15 **Farewell Drinks**

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15.30 **Conference Close**