

# STEP BENELUX CONFERENCE

**STEP**  
ADVISING FAMILIES ACROSS GENERATIONS

## A NEW ERA FOR PRIVATE WEALTH

### DAY 1 - 25 SEPTEMBER 2017

12:00pm	Registration & walking buffet lunch <i>Exhibits open</i>
1:00pm	Welcome from STEP BeNeLux <i>Louise Benjamin TEP, Chair of STEP BeNeLux, Luxembourg</i>
1:10pm	Keynote address <i>Xavier Bettel, Prime Minister of Luxembourg</i>
1:40pm	Keynote address: Luxembourg regulations in the global environment <i>Claude Marx TEP, Commission de Surveillance du Secteur Financier (CSSF), Luxembourg</i>
2:10pm	Privacy: Where are we now? Thoughts on very recent court cases <i>Panel Moderator: Dr. Hans-Joachim Jaeger, Ernst &amp; Young Ltd, Switzerland</i> <i>Maître Stéphanie Auferil, ARKWOOD Law Firm Paris, France</i> <i>Dr Philip Baker QC TEP, Field Court Tax Chambers &amp; Senior Visiting Fellow at the University of London, UK</i> <i>Serge Schroeder, Cour administrative, Luxembourg</i>
3:25pm	Networking and refreshments
3:55pm	Luxembourg focus <b>Trends in fund and corporate solutions for high net worth individuals</b> <i>Panel Moderator: Graham J. Wilson TEP, Wilson Associates, Luxembourg</i> <i>Gilles Dusemon, Arendt &amp; Medernach, Luxembourg</i> <i>Jean Schaffner TEP, Allen &amp; Overy SCS, Luxembourg</i> <i>Alain Steichen, Bonn Steichen &amp; Partners, Luxembourg</i>
5:10pm	Surprise topic <i>Richard Hay TEP, Stikeman Elliott, UK</i>
5:50pm	Day one closing address
7:00pm	Networking reception & dinner <i>Centre Culturel Schéiss, 142 Val-Sainte-Croix, L-1370 Luxembourg</i> <i>Dinner speaker: Judge Christopher Vajda, Court of Justice of the EU</i> <b>Kindly supported by Lombard International Assurance S.A.</b>

### DAY 2 - 26 SEPTEMBER 2017

8:15am	Welcome refreshments <i>Exhibits open</i>
8:45am	Welcome from STEP BeNeLux <i>Morning Chairman: Paolo Panico TEP, Programme Committee Member, Luxembourg</i>
8:50am	Keynote address: An update on Brexit <i>British Ambassador to Luxembourg, H. E. Mr. John Marshall at the invitation of the British Chamber of Commerce for Luxembourg with an update on Brexit</i>
9:20am	Wealth management and advisory - touchpoints with leading international financial centres <b>Focus on families based in Europe</b> <i>Panel Moderator: Serge Krancencblum TEP, SGG, Luxembourg</i> <i>USA – David G. Adler, Bryan Cave LLP</i> <i>Switzerland – Stephanie Jarrett TEP, Baker McKenzie</i> <i>Channel Islands – Alison MacKrell TEP, Appleby</i>
10:35am	Networking and refreshments

11:05am	Wealth planning in the Netherlands and Belgium <i>Panel Moderator: Wim Ritz TEP, Vistra (Luxembourg) S.à r.l.</i> <i>John Graham TEP, Graham Smith &amp; Partners International Tax Counsel, The Netherlands</i> <b>The recent changes in The Netherlands' tax law and their impact on wealth and estate planning</b> <i>Saskia Lust, Loyens &amp; Loeff, Belgium</i> <b>The Belgian "Cayman tax" (or look-through tax) and the impact on offshore and onshore holdings, foundations and trusts for wealth and estate planning in Belgium</b>
12:00pm	Exchange of information: What has been happening and what happens next? <ul style="list-style-type: none"><li>• Typical reporting situations</li><li>• Data subject to automatic exchange</li><li>• Usage of data by the revenue authorities</li><li>• What can be read from the data?</li></ul> <i>Dr. Hans-Joachim Jaeger, Ernst &amp; Young Ltd, Switzerland</i> <i>Andrew Knight TEP, M Partners, Luxembourg</i>
1:00pm	Lunch <b>Afternoon Chair: Louise Benjamin TEP, Chair of STEP BeNeLux, Luxembourg</b>
2:00pm	Private insurance solutions for global families <ul style="list-style-type: none"><li>• UK non-dom update: What does private insurance have to offer?</li><li>• Europe and further afield: Multi-jurisdictional planning for international families</li><li>• Private insurance as a solution for generational wealth transfer</li></ul> <i>Simon Gorbutt TEP, Lombard International Assurance S.A., Luxembourg</i>
2:30pm	EU succession regulation <ul style="list-style-type: none"><li>• Professio Juris; to choose or not to choose? How, when and why, and when and why not to choose</li><li>• Interaction with Matrimonial Property Regimes</li><li>• European Certificates of Succession; uses and abuses</li><li>• Old Treaties, and other problems</li></ul> <b>Daniel and Richard debate some of the issues and questions that the Regulation still throws up.</b> <i>Richard Frimston TEP, Russell-Cooke LLP, UK</i> <i>Dr Daniel Lehmann TEP, Baker Tilly, Germany &amp; Chairman of STEP Europe</i>
3:25pm	Networking and refreshments
3:50pm	What trends in trusts and foundations? <ul style="list-style-type: none"><li>• Round up of recent case law offshore and onshore</li><li>• Developments in trust and foundation legislation</li><li>• Emerging trust and foundation jurisdictions?</li></ul> <i>Paolo Panico TEP, Private Trustees, Luxembourg</i>
4:20pm	AMCHAM presents Luxembourg competitiveness from a US perspective <ul style="list-style-type: none"><li>• US tax reform and impact on Luxembourg</li><li>• Luxembourg as the optimal choice for US investors and multi-nationals</li><li>• Trends/updates on US-Luxembourg (EU) tax aspects</li></ul> <i>Farah El Messiri, AMMC Law SA, Luxembourg</i> <i>James O'Neal TEP, AMMC Law SA, Luxembourg</i>
4:50pm	Crypto currencies now & the rest when? <ul style="list-style-type: none"><li>• From Bitcoin to...</li><li>• Blockchain &amp; DLT</li><li>• Fintech &amp; the law</li></ul> <i>Graham J. Wilson TEP, Wilson Associates, Luxembourg</i>
5:20pm	Summary and close
5:30pm	Farewell drinks <b>Banque de Luxembourg Private Villa</b> <b>Kindly hosted and supported by Banque de Luxembourg</b>

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