

Trust Taxation in Europe

The advantages of Continental trust jurisdictions at the aftermath of the UK tax reforms

25 March 2009
Grange City Hotel
London
United Kingdom



Conference chairman

Mrs Laetitia Ahlin (Switzerland)
Managing Director
FidServe SA

Speakers

Mrs Laetitia Ahlin (Switzerland)
Managing Director; **FidServe SA**

Dr Ludovic Verbist (Switzerland)
Managing Director; **AAMIL Ltd**

Mr Paolo Panico (Luxembourg)
Managing Director; **Private Trustees**

Mr Steven Kempster (United Kingdom)
Partner; **Taylor Wessing**

Mr George Rosenberg (Israel)
Senior Partner;
Rosenberg, Keren-Polak & Co, Advocates

Ms Inbal Faibish (Switzerland)
Associate; **Rosenberg, Keren-Polak & Co, Advocates**

Mr Nicholas Jacob (United Kingdom)
Partner, Tax and Private Capital; **Lawrence Graham LLP**

Mr Richard Baldock (United Kingdom)
Executive Vice Chairman; **Rothschild Trust Group**

Programme

09:00 Welcome speech and introduction

Mrs Laetitia Ahlin (Switzerland)
Managing Director
FidServe SA

09:10 **The UK Finance Act 2008 - changes for UK resident non-domiciliaries**

- Individuals
- Offshore companies
- Taxation of trusts
- Owning UK real estate
- Planning points

Mr Nicholas Jacob (United Kingdom)
Partner, Tax and Private Capital
Lawrence Graham LLP

09:55 **Trustee mistakes: how to reverse unintended tax liabilities**

- When might unintended tax liabilities arise?
- What can trustees do to reverse them?
- What is the Hasings-Bass rule?
- Will the Courts always permit trustees to use the rule to undo their mistakes?
- Is the rule recognised in all jurisdictions?

Mr Steven Kempster (United Kingdom)
Partner
Taylor Wessing

10:40 Coffee break

11:00 **Ratification of the Hague Convention:**

- Consequences for Switzerland and Luxembourg

Dr Ludovic Verbist (Switzerland)
Managing Director
AAMIL Ltd

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11:45 Small is beautiful: Luxembourg as a new trust jurisdiction?

- The taxation of trusts and fiduciary arrangements in Luxembourg
- Trust administration and private trust companies in Luxembourg
- Securitisation, alternative investments, intellectual properties: corporate alternatives in the recent Luxembourg legislation

Mr Paolo Panico (Luxembourg)
 Managing Director
Private Trustees

12:30 Lunch

14:00 Switzerland – a jurisdiction of choice for Private Trust Companies ?

To be confirmed by the programme manager

Mrs Laetitia Ahlin (Switzerland)
 Managing Director
FidServe SA

14:45 The future of the Swiss trust industry

- Post Hague Convention ratification
- Swiss taxation of settlors and beneficiaries
- Swiss taxation of non Swiss holding companies

Mr Richard Baldock (United Kingdom)
 Executive Vice Chairman
Rothschild Trust Group

15:30 Coffee break

15:45 Trusts taxation in Israel

- Trusts in Israel - definitions, overview and recent changes
- Taxation of trusts in Israel
- Reporting duties in connection with trusts
- Change of trust status
- Tax planning with trusts and other vehicles

Mr George Rosenberg (Israel)
 Senior Partner
Rosenberg, Keren-Polak & Co., Advocates

Ms Inbal Faibish (Switzerland)
 Associate
Rosenberg, Keren-Polak & Co., Advocates

16:30 Close of the conference

Financial Events *International*

Trusts Taxation in Europe: The advantages of Continental trust jurisdictions at the aftermath of the UK tax reforms



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