Minds of the Future

Terre Blanche
Thursday 14 September-
Saturday 16 September

ALM | LAW.COM
PRIVATE CLIENT GLOBAL ELITE

Welcome

Welcome to our first 'Minds of the Future', an event which will look to the horizon of the private wealth sector.

Editorial Note

This agenda has been designed with audience participation in mind. Each of our sessions will have two facilitators to lend context to and guide the session, but they are relying on you to throw yourself into the conversation and offer your own ideas and opinions, and technical knowledge from your own practice and jurisdiction. As the group is only 50 or so individuals, we hope this means that all of you will get a chance to say your piece - and there will be a prize for the best participation.

All of our sessions are held under The Chatham House Rule - so while there will be notes made, in none of them will individuals or firms be referenced to when discussing a particular point.

A huge thank-you to our co-chairs, Piers Barclay (Macfarlanes) and Yindi Gesinde (Baker McKenzie) for their guidance and help shaping the agenda, and also to our Advisory Board for their brilliant ideas for topics, and our facilitators for bringing them to life.

A huge thank you too to our partner for this event, Kingsley Green. You can learn more about them at the back of this booklet.

We really hope you have a lovely couple of days.

Francesca Ffiske
Global Director, Private Client

Operational Note

Welcome to Terre Blanche!

Thursday
We will begin the conference with a lunch on the Fayence Terrace, from 12:00 until 14:30. Please do drop by when you arrive, as this is also where you will register for the conference and pick up your name badge. Sessions will begin in the Fayance Room at 14:30, and finish with the group being split between two breakouts at 16:30. If you are not sure which you selected please ask a member of the events team. You will have free time 17:30-19:00, after which we will meet for drinks and dinner at the restaurant by the pool, Tousco.

Friday
Breakfast will be served in the hotel. Sessions will run from 09:00-12:20, after which we will split into two roundtables. Lunch will be served at 13:20 after which you will have a free afternoon to enjoy the spa, golf, or wine tasting, or catch up on your emails. We will meet at 19:00 at the Patio for drinks, followed by dinner at 20:00.

Saturday
Breakfast will be served in the hotel from 07:00. Sessions will run from 10:00-13:00, after which we will have lunch on the Fayence Terrace.

Rachael Toovey
Global Director, Operations

Agenda

Day One: Thursday 14th September

12:00-14:30	**Arrival and Lunch**	*The Fayence Terrace*
14:30-14:40	**Welcome Comments form the Chairs** *Piers Barclay, Macfarlanes, UK* *Yindi Gesinde, Baker McKenzie, UK*	*The Fayence Room*
14:40-15:30	**'We Didn't Start The Fire': Macro Effects On Our Practice** To set the context for our agenda, we will begin with thinking of predictable and unpredictable events in the world at large, and how we can best protect our clients and firms from adverse events in the political, climatic, economic, tax, digital and family environments. *Jonathan Speck, Mourant, Jersey* *Sarah Von Schmidt, Farrer & Co, UK*	*The Fayence Room*
15:30-16:10	**Planning for the 100-Year Life** Clients now stand a greater chance of having a useful and active life until they are 100. That can mean funding their active lifestyles and businesses for much longer than in previous generations. This session will look at the problems this causes, and how these will only continue as people live longer and longer. *Hayden Bailey, Boodle Hatfield, UK* *Elizabeth Kubanik, Sullivan & Cromwell, UK/ USA*	*The Fayence Room*
16:10-16:30	**Coffee Break**	*The Fayence Terrace*
16:30-17:30	**Breakout Discussions**	
	Who Is Our Client? This session will look at how we deal with different family members, generations and family offices - who is our client? What are the potential conflicts, and how do we know who we are advising on what when everyone is wearing multiple 'hats'? *Charlotte Fraser, Farrer & Co, UK* *Alexandra Crean, Nixon Peabody, USA*	*The Tourettes Room*
	A Changing World: Modern Families Many trusts and estates have historically been based on primogeniture. In a modern family where gender is not a determinant, what does this mean? Using a real family we will explore how these changes to familial structure affect structuring. *Dickon Ceadel, Forsters, UK* *Robert Brodrick, Payne Hicks Beach, UK*	*The Feyence Room*

Day One (Continued)

17:30-19:00 **Free Time** *Of Your Choosing*

19:00-20:00 **Drinks Reception** *The Tousco Restaurant*

Cocktail Attire

20:00-22:00 **Welcome Dinner** *The Tousco Restaurant*

Cocktail Attire

Day Two: Friday 15th September

09:00-09:10 **Opening Comments form the Chairs** *The Fayence Room*

Piers Barclay, Macfarlanes, UK
Yindi Gesinde, Baker McKenzie, UK

09:10-09:50 **Paying Your Taxes** *The Fayence Room*

Following the Progressive Wealth Advisors Report we will consider whether, as an industry, whether we are too tax focussed which stops us listening to our clients' other goals. With such great disparities in wealth, large benefactors are looking to shape the world through their philanthropic initiatives, using private wealth rather than public money to deal with some of the world's big problems around food, mental health and support to key areas. What duty do private wealth advisers have in this conversation and what opinion/stance should advisers take on these questions?

Pierre Ali-Noor, Carey Olsen, Jersey
Lorenzo Ferro, Chiomenti, Italy

09:50-10:30 **Push and Pull Factors: What Our Clients Want?** *The Fayence Room*

What are the real push and pull factors that make clients want to move to or leave a jurisdiction, and are they changing? In this session we will look at what will make our clients take up residency over the next few years - looking at such themes as stability, the attitude towards the wealthy, the role of taxes, and immigration.

Juliana Cavalcanti, Humberto Sanches e Associados, Brazil
Claire Weeks, Maurice Turnor Gardner, UK
Giorgia Zanetti, Maisto e Associati, Italy
Matthew Sperry, Katten, USA

10:30-11:00 **Coffee Break** *The Fayance Terrace*

11:00-11:40 **Artificial Intelligence** *The Fayence Room*

Isabella is a fully qualified lawyer with over ten years of global experience in M&A, private equity, venture capital and banking and finance. As part of the Leadership Team at Outlier Ventures, Isabella provides strategic advice. She will be talking to us about the role of AI in the legal industry.

Isabella Tiesenhausen, Outlier Ventures

Day Two (Continued)

11:40-12:20	**AI vs. EI: What Skills Will We Need in the New World** What new skills will be needed to replace the skills we have now, in retaliation against AI. Training and education? The role of emotional intelligence for Next Gen leaders in law firms. The evolving nature of leadership and moving away from traditional leadership concepts, why cultivating emotional intelligence is a fundamental skill for future leaders to cope with ambiguity amongst clients, navigate challenges with resilience, and to foster a collaborative culture to encourage diverse perspectives. How can we prepare for these future issues we can't even comprehend yet? *Patricia Guerra, MLL Legal, Switzerland* *Michael Rutili, Stephenson Harwood, UK*	*The Fayence Room*
12:20-13:20	**Breakout Discussions**	
	Succession Regimes In this session we will look at succession regimes in the context of intestacy provisions in different jurisdictions and intergenerational succession planning: how can we tell the applicable law for different situations, and how can it be enforced? *Florentino Carreno, Cuatrecasas, Spain* *Caroline Tayler, Taylor Wessing, UK*	*The Fayence Room*
	Watching the watchmen: where will it end? This session will explore the role of lawyers and other professionals as watchmen and gatekeepers to the world's markets. Does the increasing level of regulation prevent us from advising our clients fully? Is that an issue? Topics will include the criminalisation of tax advice, enablers legislation and recent developments in transparency rules. *Hugh Gunson, Charles Russell Speechlys, UK* *Gilly Kennedy-Smith, Mourant, Guernsey*	*The Tourettes Room*
13:20-14:30	**Lunch**	*The Fayance Terrace*
14:30-19:00	**Free Afternoon** Please use this time to catch up on work if you need to, or to enjoy the hotel's facilities - it's award-winning spa or golf course. You will be able to book to use both with the hotel directly. Alternatively, if you would like to leave the hotel, there are wonderful walks and sites to see in the nearby Provençal countryside.	*Of Your Choosing*
19:00-20:00	**Drinks Reception**	*The Patio*
20:00-22:00	***Dîner Avec Amis***	*The Patio*

Day Three: Saturday 16th September

10:00-10:15 **Opening Comments form the Chairs** *The Fayence Room*

Piers Barclay, Macfarlanes, UK
Yindi Gesinde, Baker McKenzie, UK

10:15-10:55 **The Business of Law** *The Fayence Room*

Whether fostering of strategic partnerships with new and emerging industries, enhancing client experience to meet evolving client needs, innovation within business development to provide long-term but flexible value, the business of private client law has plenty to be considered.

Johannes Gasser, Gasser Partner, Leichtenstein
Alex Ruffel, Irwin Mitchell

10:55-11:35 **Firms in the Public Eye** *The Fayence Room*

Working with individuals and families means that private client departments face unmatched risk and reputation assessments to protect the firm and individual advisors. Where do we stand on working for 'unpopular' clients, and how should one proceed?

Oliver Schneider-Sikorsky, BCL, UK
James Campbell, Ogier, Jersey

11:35-12:15 **Open Forum** *The Fayence Room*

This session is our chance to talk about anything that we haven't already covered - or dive deeper into topics we found particularly interesting.

Piers Barclay, Macfarlanes, UK
Yindi Gesinde, Baker McKenzie, UK

12:15-13:30 **Lunch and Close of Conference** *The Fayance Terrace*

Delegate Profiles

Pierre Ali-Noor | Senior Associate | Carey Olsen | Jersey

Pierre Ali-Noor is a senior associate in Carey Olsen's litigation team in Jersey. He specialises in the court-related aspects of trusts and private wealth practice and is engaged in a broad spectrum of private wealth work covering advisory, administrative and contentious trusts matters. He is regularly involved in applications by trustees for administrative directions, applications by trustees and beneficiaries for relief on grounds of mistake, applications for orders approving compromises of disputes on behalf of minor, unborn and unascertained beneficiaries.

Hayden Bailey | Partner, Head of Private Client & Tax | Boodle Hatfield | UK

For over 20 years, Hayden has been advising family businesses, senior executives including private equity, and landowners on their succession, tax and governance strategy. He has particular experience of generational wealth transfer and the asset and business protection structures that can be used to achieve a successful succession. As a chartered tax adviser he advises on complex tax structures as well as advising non-UK domiciliaries on their UK taxation exposure, asset holding structures and Family Office arrangements.

Piers Barclay | Partner, Head of Private Client | Macfarlanes | UK

Piers specialises in succession, tax and estate planning advice for individuals and their families as well as related advice to trustees and other private client service providers, such as family offices. In addition to UK-based clients, much of his work has an international element, including structuring multi-jurisdictional estates, using trusts in civil law and Shari'a law countries and advising non-UK trustees on tax and fiduciary matters. He has experience in UK pre-arrival planning for non-domiciliaries, remittance basis advice and the implementation of trusts, wills etc. on arrival.

Mark Barmes | Senior Counsel | Lenz & Staehelin | Switzerland

Mark Barmes contributes actively in the field of wealth planning in Switzerland and particularly in connection with trusts and trust disputes. Mark Barmes also acts for international organizations in employment disputes before the Administrative Tribunal of the International Labour Organization.

Riccardo Barone | Partner | Tavecchio & Associati | Italy

Riccardo Barone is enrolled in the Register of Chartered Accountants of Milan and in the Register of Auditors. He graduated in Economics and Company Law from Bocconi University in Milan and obtained a Master degree in Fiscal Law from the University Cattolica del Sacro Cuore in Milan. He joined Tavecchio & Associati in 2015 after an experience in a leading tax firm. He is Partner of the Firm since 2021.
His practice mainly focuses on personal and estate planning, trusts and taxation of individuals, real estate, financial instruments, international taxation.

Robert Brodrick | Partner, Management Board | Payne Hicks Beach | UK

Robert advises on tax, trust and estate planning for wealthy individuals, their advisers and trustees. He acts for a wide range of clients including the owners of landed estates, business people, non-domiciliaries and international families with assets in multiple jurisdictions.

Florentino Carreño | Partner | Cuatrecasas | Spain

Florentino Carreño is an expert in asset structuring between countries and generations, the application of double-tax treaties and the international automatic exchange of information for tax purposes. He also focuses on structuring private equity, hedge funds and insurance. He developed his career at Cuatrecasas's London office from 2006 to 2009. An academician of The International Academy of Estate and Trust Law, he was its president from 2020 to 2022. He is also an international fellow of the American College of Trust and Estate Counsel.

James Campbell | Partner | Ogier | Jersey

James has extensive experience advising professional trustees, family offices, intermediaries and high-net worth families (both internationally and locally) on all aspects of Jersey trusts, foundations and estate planning together with all related company and commercial law issues. He is also experienced in establishing private wealth structures across multiple luxury asset classes to include yachts, classic cars, super cars, art and fine wine. He is part of Ogier's Aviation and Marine sector group.

Juliana Cavalcanti | Partner | Humberto Sanches e Associados | Brazil

Since 2012, Juliana has been working primarily in advising individual clients on demands related to wealth and succession planning in Brazil and abroad. With multidisciplinary experience, Juliana works with the creation, organization, and structuring of investments in Brazil and abroad, such as companies, investment funds, and trusts. She also advises clients on various corporate law matters, usually related to family businesses, shareholder agreements, and corporate governance. Juliana also assists clients when they want to relocate from Brazil to other countries.

Dickon Ceadel | Partner, Family | Forsters | UK

Dickon specialises in supporting clients to resolve financial disputes and children issues that arise on relationship breakdown and divorce. He has a particular specialism in preparing and negotiating pre and post nuptial and cohabitation agreements, often involving high value or complex assets and an international dimension. Dickon is known for taking a pragmatic and constructive approach towards resolving issues.

Louise Charleson | Partner | Ocorian Law | Bermuda

Louise is a Partner with Ocorian Law (Bermuda) Limited. She provides legal advice to Ocorian's trust and corporate services businesses. Prior to joining Ocorian she was Head of Legal at a financial institution and before that held senior positions at prominent offshore law firms in Bermuda. Louise has advised Bermuda and international clients on a wide range of trust, regulatory, corporate and commercial matters. She has been involved in a number of high value trust litigation and court approved trust restructurings.

Jonathan Colclough | Partner | BDB Pitmans | UK

Jonathan is a partner in the firm's private wealth team. He advises both UK residents and international clients on UK tax, trusts, estate and succession issues with a particular focus on international cross-border matters for non-UK domiciled clients (resident in the UK or elsewhere), offshore trustees and family offices. This includes advising on residence, domicile, the remittance basis of taxation, and developing or refining structures and strategies to preserve wealth and avoid unnecessary tax and succession implications.

Jonathan Conder | Partner | Stephenson Harwood | UK

Jonathan is a partner in Stephenson Harwood's private wealth group and advises UK and international private clients, trustees, foundations, family offices and private banks on all aspects of tax, trust, estate and succession planning, regulatory, immigration and philanthropic issues. He also has significant experience in assisting families and trustees in responding to tax investigations and resolving disputes. He is very experienced in complex cross-border estate planning, coordinating matters for clients whose assets are located in or affected by different legal and tax systems.

Alexandra Crean | Associate | Nixon Peabody | USA

Alexandra is an associate in Nixon Peabody's Private Clients Group and a member of the International Private Clients Team. She is based in the U.S. and out of the firm's Boston Office. She represent clients in estate planning, estate and trust administration, and tax planning matters with a focus on working with international clients, their families, and their advisors. Having spent the first half of her career focused on estate and trust administration matters, she provides a practical approach to estate planning, both for U.S. domestic and international families.

Marcus Dearle | Senior Partner | Miles Preston | UK, Hong Kong

Marcus Dearle is Senior Partner at Miles Preston in London, Immediate Past Chair of the International Bar Association, Family Law Committee, and a Fellow of the International Academy of Family Lawyers. In addition to being admitted in England & Wales, he uniquely practises in Hong Kong family law from London. He is also admitted, but not practising in, the BVI. Marcus is ranked in the Chambers High Net Worth Guide in the Family/Matrimonial Finance: Ultra High Net Worth section and recognised as a leading trusts and divorce litigation practitioner.

Joris Draye | Partner | NijsDraye | Belgium

Joris is a registered attorney at law at the Antwerp Bar with a focus on international tax matters. He guides high-net-worth individuals and families through the ever-changing tax and legal environment and strive for integrated, onshore, simple solutions. He is a member of the Society of Estate and Trust Practitioners (STEP Benelux). He also obtained an LL.M. in Tax from King's College London. I wrote various contributions re cross-border tax topics and double taxation treaties in high quality national and international publications.

Lorenzo Ferro | Associate | Chiomenti | Italy

Lorenzo advises Italian and international clients mainly in the field of international tax law, corporate restructuring, transfer pricing, as well as in matters related to trusts and wealth management.

Elina Filippou | Partner, Head of Private Client | Zepos & Yannopoulos | Greece

Elina heads the firm’s private client practice. She brings in years of experience in international tax matters and the way they impact the structuring of wealth and the performance of investment activity. She has been working with multijurisdictional family offices, asset managers and family-owned businesses on wealth structuring and estate planning, multi-generational governance and estate planning matters. She is active in the start-up ecosystem, working with start-ups and their investors, on tax aspects over the life of the activity from set up to exit.

Charlotte Fraser | Partner | Farrer & Co | UK

Charlotte has extensive experience of complex domestic and multijurisdictional trust disputes involving breach of trust, beneficiary rights of information and jurisdictional issues. Charlotte has particular experience of claims involving fraud and asset tracing and has represented both claimants and defendants in connection with freezing injunctions and disclosure orders. Charlotte frequently advises on succession issues including validity claims, capacity and construction issues as well as claims under the Inheritance (Provision for Family and Dependents) Act 1975.

Jutta Gangsted | Senior Associate | Lenz & Staehelin | Switzerland

Jutta Gangsted is an associate at our Geneva office, where she is a member of the Private Clients group. Jutta specialises in various aspects of international wealth and estate planning, as well as international dispute resolution. Before joining Lenz & Staehelin, she worked at a law firm abroad, specialising in corporate law. Jutta's practice also includes international contract and commercial law, and corporate, as well as private, international law.

Johannes Gasser | Senior Partner | Gasser Partner | Liechtenstein

Johannes is a partner of the firm since more than 20 years and heads the private client team within GASSER PARTNER, a Chambers and Legal500 tier one and full service firm in Liechtenstein. Having taken over the trust business of Credit Suisse Trust Liechtenstein recently, Johannes will focus on private client work, whilst continuing advising and representing private clients in and out of court in all areas of foundation and trust law. Johannes is a frequent lecturer and his commentary on foundation law is considered by courts and practice as the leading authority.

Yindi Gesinde | Partner | Baker McKenzie | UK

Yindi is a partner in Baker McKenzie's market-leading Trust Disputes group in London. Yindi advises clients (including trustees and high-net worth individuals) involved in complex disputes related to trusts, succession and private wealth, with particular experience in the Channel Islands, Bermuda and Asia, where she spent time working in the Baker McKenzie Hong Kong office. Yindi sits on the Steering Committee of the Firm’s Africa Strategy and co-leads the Baker McKenzie London employee network for Black, Asian and minority ethnic employees, BakerEthnicity.

Jannika Glendon | Associate | McDermott Will & Emery | UK

Jannika Glendon focuses her practice on dispute resolution issues, including contested estates, acting for high net worth individuals in private trust disputes, as well as commercial dispute resolution and arbitration. She is The Legal 500 UK, Recommended Lawyer in Contentious Trusts ad Probate (2023), Ones to Watch in Trusts and Personal Tax Law (2024)

Patricia Guerra | Partner, Head of Latin America | MLL Legal | Switzerland

Patricia Guerra is head of the private clients team in Zurich and head of the Latin-America desk of the firm. She has extensive experience in advising UHNW and HNW individuals and families in all personal matters and matters concerning family assets as well as in philanthropic endeavours. Patricia Guerra continuously deals with complex cross border issues and regularly takes on the legal leadership necessary to coordinate teams across various jurisdictions. She is fluent in English, Spanish, German and French and has command of Portuguese and Italian.

Hugh Gunson | Partner | Charles Russell Speechlys | UK

Hugh specialises in disputes and investigations across all areas of tax, both direct and indirect, for clients including individuals, trustees, family businesses and corporates. His practice also includes tax-related commercial and trust disputes, including claims for mistake and rectification and tax-related professional negligence.

Hans Hooyberghs | Attorney | NijsDraye | Belgium

Hans Hooyberghs, attorney-at-law at the Belgian niche firm NijsDraye, focusses on the wealth and estate planning of high-net-worth individuals and entrepreneurial families. He is specialised in (inter)national family property law (relational property law, inheritance law, wills and donations), gift and estate taxes, as well as in the transfer, governance and succession of family businesses. Dedication, big picture awareness and long-term approach are key to him. Hans is a proud father of Juliette and Raphael, and a passionate collector of antique Christmas ornaments.

Alex Jones | Partner | Macfarlanes | UK

Alex advises UK and international families, trustees and family offices on structuring, succession and estate planning. Most of his work is cross-border and involves families with connections to multiple jurisdictions. Alex frequently acts for entrepreneurs and their family offices, advising on structuring, tax and succession issues for complex corporate groups and family assets. He regularly advises investment fund managers and senior executives, including in relation to remuneration, carried interest and co-investment arrangements.

Gilly Kennedy-Smith | Partner | Mourant | Jersey

Gilly is a private wealth lawyer, qualified in Guernsey and England, with both offshore and onshore experience. She works with UHNW families, trust companies, family offices and wealth generators to preserve their family wealth. She has a particular focus advising and project managing change of control events within the family, succession and updating of structures for clients with cross border interests, who are affected by different laws and mobile family members, as well as collaborative family wealth generation and inter-generational projects.

Elizabeth Kubanik | European Counsel | Sullivan & Cromwell | USA/UK

Elizabeth Kubanik is a European Counsel in Sullivan & Cromwell's London office and has been a member of the Estates and Personal Group since 2011. Elizabeth has been based in the London office since September 2019; previously she was based in the New York office. She has participated in the representation of U.S. and international families and fiduciaries with respect to a broad range of tax and planning issues, including extensive advice with respect to trust and family business planning and charitable planning.

Ken Maxwell | Director | John Lamb Hill Oldridge | UK

Ken has responsibility for our private wealth clients. His diverse range of clients include high-net-worth families, single and multi-family offices, listed companies and SMEs. He delivers exceptional client experience. A significant area of his work is advising individuals and families (and their family offices) for whom a key concern is succession of their wealth and family businesses down the generations with a view to stewardship, while also ensuring asset protection, privacy and tax efficiency.

Nicolas Merlino | Partner | Poncet Turrettini | Switzerland

Nicolas Merlino is a Swiss lawyer, Swiss certified tax expert as well as a graduate of Business Administration and Finance. He is a partner at Poncet Turrettini, a Geneva law firm. Practising the law since 1993, and with previous work experience in banking and finance both in the US and Switzerland, his main practice areas are the taxation of private clients, of businesses and companies, of savings (investments and financing) and of executives. Nicolas Merlino is a lecturer, a frequent speaker at conferences and author of several tax publications (books and articles).

Elizabeth Nicholas | Partner | Penningtons Manches Cooper | UK

Elizabeth advises wealthy individuals on a broad range of UK tax and estate planning matters, focusing in particular on inheritance tax and capital gains tax planning. She has substantial experience in the taxation of UK resident non-domiciled individuals and the cross-border structures used by such clients for wealth protection and tax planning purposes. As such, Elizabeth also regularly advises trustees (both UK resident and non-UK resident) on a range of trust law and UK tax issues.

Thaís Obrist | Partner | MLL Legal | Switzerland, Brazil

Thaís Obrist-Bdine is a Brazilian lawyer with a master's degree in Switzerland. She practices tax law and is part of our Private Clients team. Thaís Obrist-Bdine advises individuals and companies on issues related to national and international taxation. Her practice also focuses on estate and wealth planning for Swiss and foreign private clients, in particular for clients from Latin America. Before joining MLL Legal, Thaís Obrist-Bdine worked for a leading business law firm in São Paulo.

Devvrat Periwal | Partner | AC&H Legal Consultants | UAE

Devvrat is a Partner at ALN UAE | Anjarwalla Collins & Haidermota. He has been practicing law for over 10 years and regularly advises HNIs, UHNIs and family-owned businesses on succession planning, next generational transfer of wealth and corporate governance matters. Devvrat also advises corporate entities on all aspects of corporate law including new business set ups, mergers and acquisitions, joint ventures, and shareholder related matters (including dispute resolution). He has advised investors and companies within hospitality, banking and trading industries.

Beatrice Puoti | Partner | Stephenson Harwood | UK

Beatrice's primary focus is advising UK residents and non-residents, domicile and non-domicile individuals, private banks, trustees, and family offices, on their international tax, trust, and estate planning issues. Beatrice has an extensive portfolio of clients and specialises in a European tax and trust practice with a particular expertise on Italian issues. Beatrice also has significant experience in advising financial institutions and trustees on international trust and tax matters and on the ownership, structuring and acquisition of UK and non-UK real estate.

Lottie Ruffel | Director | Kingsley Green Private Client | UK

Lottie is passionate about private client recruitment and has demonstrated her success in sourcing elite professionals for a variety of roles. She is a leading career advisor specialising in private client placements within a variety of sectors and firms. Lottie is an expert in cultivating deep relationships with clients, ensuring a thorough understanding of their talent requirements and delivering tailored recruitment strategies. She prides herself at being adept at navigating the unique needs and demands of her clients, where the experience is as important as the result.

Alex Ruffel | Partner | Irwin Mitchell | UK

Alex is a Partner in the Tax, Trusts & Estates Team in London. Her areas of expertise include advising high-net worth individuals, families, their companies and trustees. She advises on complex situations such as cross-border tax-planning, estate-planning, trust structuring and also immigration. This includes assisting clients to structure personal investments and interests tax-efficiently and planning for their successful transmission to the next generation. She acts in particular for non-UK nationals and non-UK domiciliaries and those who wish to relocate to or exit the UK.

Michael Rutili | Partner | Stephenson Harwood | UK

Michael is a trusted adviser to numerous, mostly European, private clients, their families and businesses. He has experience advising on a wide range of UK and international matters involving tax, estate planning and succession issues. Michael has developed a unique practice assisting private clients and their businesses which straddles both advisory and litigious angles.

Tanja Schienke | Partner | Flick Gocke Schaumburg | Germany

Dr Tanja Schienke-Ohletz has been an attorney since 2005, Tax Advisor since 2009 Study of law at Cologne. She has been at Flick Gocke Schaumburg since 2007. She specialises in taxation of individuals, inheritance and gift tax, international tax, company succession and advising foundations and non-profit organisations.

Clemens Schindler | Partner | Schindler Rechtsanwälte | Austria

Clemens Philipp Schindler is a Founding Partner of Schindler Attorneys. Before establishing the firm, Clemens spent six years as a Partner at Wolf Theiss, where he led some of the firm's most prestigious transactions and headed its Brazil operations. Clemens focuses on corporate and tax advice in relation to public and private mergers and acquisitions, private equity and corporate reorganisations (such as mergers, spin-offs and migrations), most of which have a cross-border element. He specialises in international holding structures, as well as private client work.

Oliver Schneider-Sikorsky | Partner | BCL Solicitors | UK

Oliver is a partner specialising in business crime, regulatory investigations, and general criminal litigation. His practice centres on defending the freedoms, assets, and reputation of High Net Worths (HNWs) and their family members.
Oliver's clients are public figures, politically exposed persons, and HNWs in the business, finance, and entertainment sectors. He regularly coordinates complex cross-border defensive engagements for individuals and international family offices with sophisticated financial arrangements or business affairs.

Jonathan Speck | Senior Partner | Mourant | Jersey

A Jersey Advocate and Partner of Mourant Ozannes (Jersey) LLP, Jonathan specialises in commercial litigation, principally involving contentious and non-contentious trust cases. He has written and lectured about these topics around the world. In 2017, he was elected as an Academician of the International Academy of Estate and Trust Law in recognition of my contribution to the profession. Jonathan is the firm's Senior Partner, a leadership role that entails being an ambassador for the Mourant Ozannes group, our clients and people.

Matthew Sperry | Partner | Katten | USA

Matthew Sperry is an international private client attorney whose practice is devoted to making it easier for global ultra-high-net-worth individuals and families to access the United States, whether it be for investment, spending time in the US or utilizing US trust and other structures to advance personal goals or otherwise. He believes in using state-of-the-art trust, corporate, family office, fund and other US legal concepts to develop simple but effective wealth succession and family governance structures that minimize global tax and reporting burdens, foster privacy, and protect personal wealth.

Diane Stirling | Vice President, Butterfield Trust | Butterfield | Bermuda

Diane has over 27 years' experience in the trust industry. She manages a portfolio of complex trusts for ultra-high net worth individuals and oversees a team of trust professionals who assist with the administration of the portfolio. The portfolio consists of complex trust structures holding a wide range of assets with a value in excess of $10 billion. Assets include: private trust companies, private investment holding, operating companies, financial portfolios, works of art, musical instruments, real estate, and private jets.

Andrea Tavecchio | Founding Partner | Tavecchio e Associati | Italy

Andrea Tavecchio, TEP, born in Milan in 1969, founded Tavecchio & Associati in 2008 and the Firm is now top ranked by Chambers and Partners HNWI (Tax Advisors). Andrea is an expert in the field of wealth planning and assists private clients in estate, tax and succession planning, advising also on cross-border issues. He is also advisor on tax and governance matters of some Italian and international Family Offices and Trustees.

Caroline Tayler | Partner | Taylor Wessing | UK

Caroline specialises in resolving trust and succession disputes both onshore and offshore. She advises on all manner of contentious issues relating to the formation and administration of trusts, contested probate, professional negligence in respect of tax and trust planning and claims under the Inheritance (Provision for Family and Dependants) Act 1975. She also has significant experience advising trustees and beneficiaries in relation to complex trust applications involving variations, agreed compromises or blessings of the exercise of trustee powers.

Nicola Thorpe | Partner | Charles Russell Speechlys | UK

Nicola advises on a wide range of private wealth matters, including international and domestic personal tax, trust structuring, succession and estate planning. Nicola's clients include high net worth individuals, trustees, family offices and private banks. Her work often has an international element and she regularly advises on issues arising as a result of foreign domicile and conflicts of laws. She also advises on the creation and operation of international structures for tax, succession and asset protection purposes.

Sarah Von Schmidt | Partner | Farrer & Co | UK

Sarah is an experienced private client lawyer with a strong reputation for her work on trusts, wills and succession planning, and family constitution and governance issues. She builds deep and lasting relationships with clients, who value her genuine interest in and commitment to finding the right solution for them. Sarah leads the firm's private client group and has a diverse practice spanning the private client sector. She has developed an unusually broad range of expertise in the field, with a special interest in trusts issues.

Claire Weeks | Partner | Maurice Turnor Gardner | UK

With the ability to present complex issues in a clear and easily-digestible way, Claire's clients derive particular benefit from her exceptional understanding of international tax and trust issues. The winner of two STEP Worldwide Excellence Awards and numerous 'Rising Star' accolades, Claire is recognised as an expert in providing advice on bespoke multi-jurisdictional wealth planning strategies and investment structures. Claire was named as one of the 2023 Private Client Global Elite, and is ranked by Chambers & Partners (HNW) for her Private Wealth Law expertise.

Henry Wickham | Head of Estate Planning, Wills & Probate | Ogier | Jersey

Henry advises on all aspects of Jersey trusts, foundations and estate planning and related corporate law issues. He is widely experienced in both local and international will and probate matters and has particular expertise in the administration of high net worth and multi-jurisdictional estates as well as complex succession planning and will drafting.

Giorgia Zanetti | Associate | Maisto e Associati | Italy

Giorgia Zanetti was admitted to the Association of Chartered Accountants in 2010. She joined Maisto e Associati in 2007, after graduating at the University of Milan Luigi Bocconi. She works in particular with international taxation, estate planning, taxation of trusts and tax litigation.

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Butterfield is a publicly traded company in the US on the New York Stock Exchange (NYSE: NTB) and in Bermuda on the Bermuda Stock Exchange (BSX: NTB BH).

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You can contact Rhiannon with any general feedback or enquiries.