PRIVATE CLIENT
GLOBAL ELITE

INTERNATIONAL PRIVATE CLIENT FORUM

THURSDAY 12 - SATURDAY 14 NOVEMBER 2026

VILLA D'ESTE, LAKE COMO, ITALY







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WELCOME

Welcome to our 23rd International Private Client Forum. For many of you, this is a much-loved annual tradition; for me, it is my first, and I'm delighted to be finally experiencing it with you.

It has been such a pleasure to become part of this elegant, intelligent and wonderfully friendly community, and to help curate the agenda for this year's event. My sincere thanks go to our board, Nick Jacob, Marco Cerrato, Patricia Guerra, John Teitler, Philippe Pulfer, Clare Maurice and Basil Zirinis, for the time, insight and energy they have given to shaping the programme.

Together with our two wonderful co-chairs, Beatrice Puoti and Jonathan Speck, they have helped us settle on a theme that feels particularly fitting for the world in which we find ourselves: Law and Disorder.

From geopolitical and economic upheaval to AI and rapidly evolving regulation, private clients and their advisers are operating in an environment of extraordinary change. Our programme will look beyond the immediate legal questions to consider what all of this means for families, wealth and the trusted adviser relationship, bringing the Global Elite community together to exchange ideas, challenge assumptions and learn from one another.

Thank you to our wonderful partners, without whom we would not be here. We value your contributions enormously, whether in the sessions or in the ballroom.

It is difficult to imagine the Private Client Global Elite calendar without our annual gathering at Villa d'Este, and we hope you enjoy it as much as we do. We invite you to converse, participate, challenge one another and, hopefully, argue a little over these three days on Lake Como.

Salute!

Alexi Whitehouse

SVP, Private Client Global Elite
Event Management



WELCOME

from our co-chairs

We very much look forward to welcoming you to the International Private Client Forum – would you believe the twenty-third. We are thrilled to be co-chairing the event together again and very grateful to the whole team, especially our wonderful Centellic colleagues, for putting together what we hope you will find an engaging and challenging programme.

Our theme this year is Law and Disorder. For decades, the private client world thrived on predictability - stable tax regimes, predictable geopolitics, and steady technological evolution. Today, that predictability has evaporated.

When we came up with this title some months ago, we had no real idea of how prescient it was going to prove.

Over the last month, we have all watched with varying degrees of horror and alarm as the streets of Western Europe - from Paris and Milan to Brussels and Lisbon – have been gripped by a profound wave of social and political unrest. Driven by housing crises, soaring costs of living, and a fraying social contract, the stability of traditional European jurisdictions is being profoundly shaken. All this on top of war in Europe and the Middle East, causing some to theorise that we are closer than ever to World War Three.

For our clients, this is not just an abstract political debate. When governments face collapsing public infrastructure and mass street protests, soaring debt and stagnant growth, the political response is inevitably structural. We are seeing a rapid weaponization of tax policy, aggressive transparency registries, and a growing legislative backlash against mobile capital.

And so we are living in an era of 'rules-based disorder.' The rules are changing faster than ever, driven by shifting geopolitical alliances, ideological battles over wealth distribution, and exponential leaps in artificial intelligence. As advisors to the world's most global families, our job is no longer just to interpret the law - it is to help our clients navigate the chaos.

Over the next few days, we will explore how to turn this systemic disorder into structured opportunity. But above all, we are excited to have the luxury of time to spend with so many friends and colleagues from around the world – both old and new. And if you are starting to be a little shaken, remember that the only thing that should be shaken properly is the perfect martini!



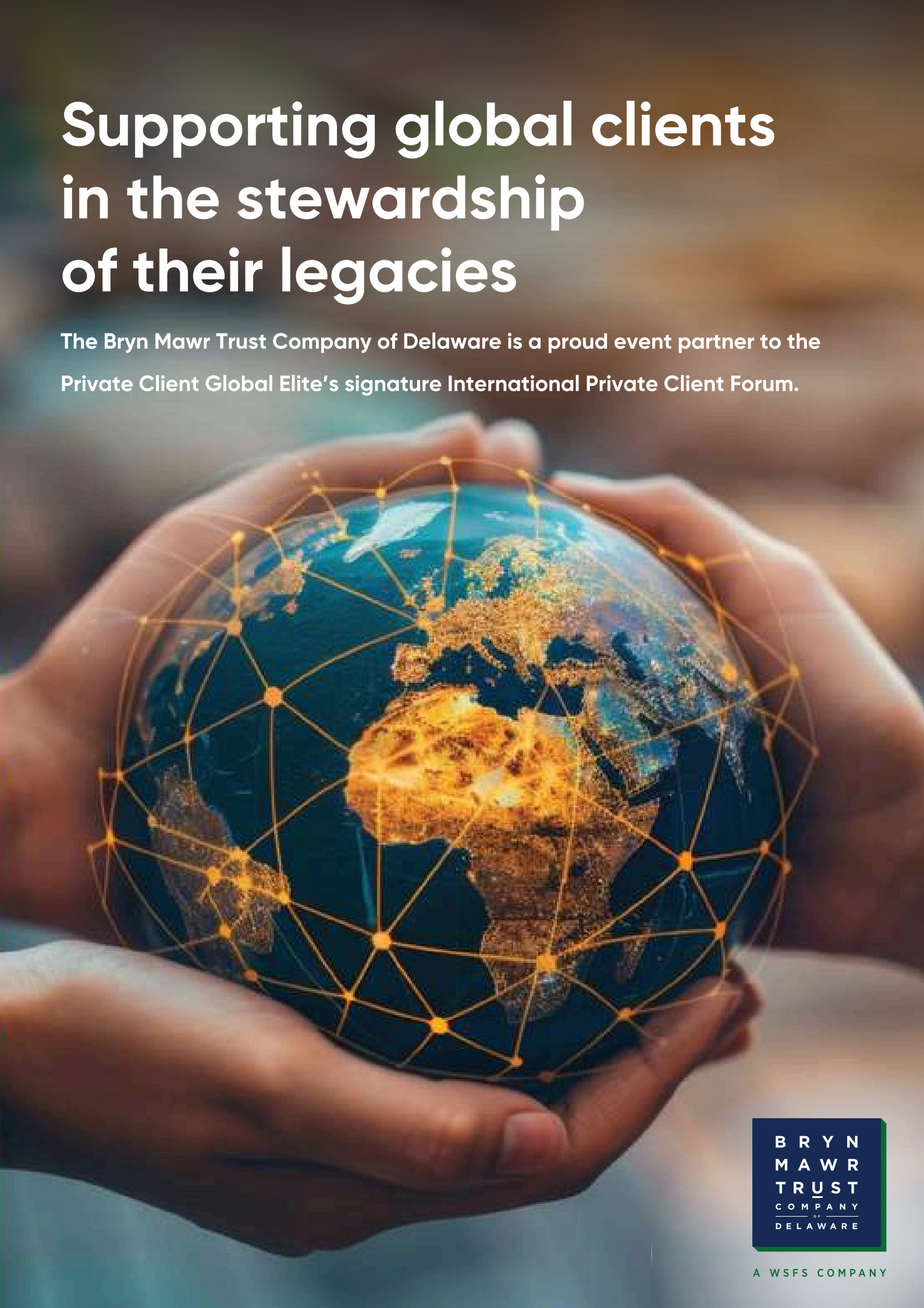
Beatrice Pusti
Partner
Stephenson Harwood

Jonathan Speck
Senior Partner
Mourant



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The Bryn Mawr Trust Company of Delaware is a proud event partner to the Private Client Global Elite's signature International Private Client Forum.



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WELCOME

Operations note

It is a pleasure to welcome you back to the wonderful Villa d'Este. Please find some guidelines for your reference below, which you may need throughout the Forum.

Thursday - We will host a welcome lunch at 12:30 in La Veranda. We will move through to La Regina and the conference sessions will commence at 13:30. Staff will be there to guide you.

Our Welcome Drinks will commence at 19:30 in The Lobby with our Welcome Dinner at 20:30 in La Veranda. The dress code is cocktail attire.

Friday - Sessions will begin at 8:50 in Sala Regina, followed by breakouts in the main building of Villa D'Este.

Lunch will be served at 13:20 in La Veranda, after which we will go into our leisure activities. If you have not selected your preferred activity already, or would like to change your selection, please contact me or a member of the team as soon as possible.

Our Gala Dinner will commence in the main lobby at 19:00 with a champagne reception, followed by our Gala Dinner at 20:00. The theme is Brilla Sotto le Stelle (Sparkle Under the Stars). We encourage you to add a touch of sparkle to your black-tie attire.

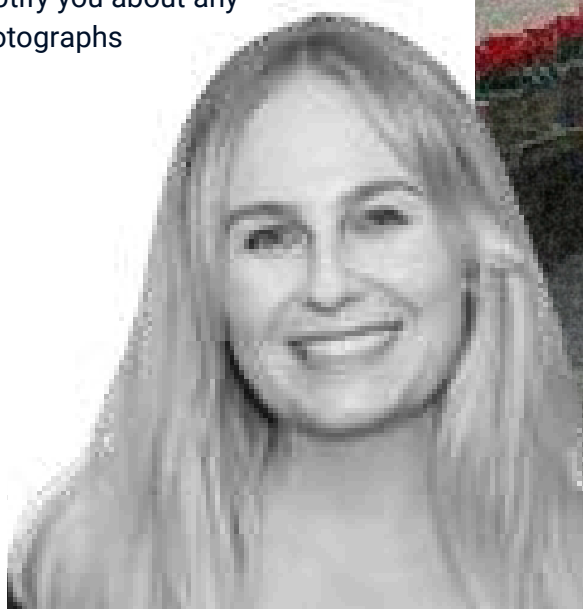
Saturday - Saturday morning's session will take place in La Veranda after breakfast.

If you have not extended your stay you should check out during breakfast on Saturday as your rooms need to be vacated by 12:00. Please ensure you settle any extras directly with the hotel.

If you did not get a chance to join our WhatsApp group in advance, please ask a member of the team and we can add you. We will use it to notify you about any movement changes, and of course for everyone to share photographs and plans.

Rachael Toovey

Senior Director, Global Membership Operations,
Corporate and Private Client Global Elite



AGENDA

Thursday
12 NOVEMBER 2026

WELCOME LUNCH

12:30 - 13:30
La Veranda

WELCOME COMMENTS FROM THE CO-CHAIRS

13:40 - 14:00
Sala Regina

***Beatrice Puoti**, Partner, Stephenson Harwood*
***Jonathan Speck**, Senior Partner, Mourant*

KEYNOTE - HOW TO THRIVE IN RULES BASED DISORDER

14:00 - 15:00
Sala Regina

The world is getting more uncertain and volatile. It has always been in flux, but the difference now is the pace of change. There are new layers of political complexity. What is going to happen next? How can organisations cope with this new world disorder. Is the rules based order dead? How can we build resilience? What does this mean for the future of services as businesses seek to build tools to cope with complexity and mass information?
Dame Penny Mordaunt

HELL IN A HANDCART: WHEN GEOPOLITICS REDRAWS THE MAP

15:00 - 15:40
Sala Regina

We are living through an era of profound geopolitical disruption, and its effects are increasingly shaping the planning strategies of both individuals and businesses. Plans that once seemed secure can be overturned overnight, raising the question: are there still reliable geopolitical anchors for structuring personal and corporate futures? This session explores flexible, cross-jurisdictional planning, including strategies for relocating assets, managing tax implications, and structuring plans for both temporary relocation and eventual return. Advisers will learn where assets should be held, how to maintain continuity amid political upheaval, and how to help clients protect wealth and corporate interests while remaining agile in a rapidly shifting global landscape.
***Marco Cerrato**, Partner, Maisto e Associati*
***Humberto Sanches**, Managing Partner, Humberto Sanches + Associates*
***Sarah von Schmidt**, Partner, Farrer & Co.*
***Lisa Vizia**, Director, Saffery Trust*

COFFEE BREAK

15:40 - 16:10
Sala Regina

TRUSTS AND FOUNDATIONS ON TRIAL: WHAT THE COURTS ARE TEACHING PLANNERS

16:10 - 16:50
Sala Regina

Trusts and foundations are under increasing attack, from spousal claims in divorce and beneficiary actions to forced heirship challenges and creditor claims. At the same time, courts (particularly those less familiar with trust planning) are recasting standard provisions as suspicious or extraordinary. Cross-border exposure adds further risk, with mismatches in legal frameworks, public policy, and tax regimes across jurisdictions. This area of law is evolving rapidly, and not for the better. The risks extend beyond outcomes to the litigation process itself, including expansive disclosure obligations, the fiduciary exception to privilege, foreign discovery tools such as Section 1782, and stark differences in privilege regimes - especially in civil law systems.
While this is not a litigation forum, it is critical for advisers to understand these risks early. This session brings a litigation-informed perspective to the planning table, highlighting where challenges are arising and why.
***Basil Zirinis**, Partner, Sullivan & Cromwell*
***Josephine Howe**, Partner, Ogier*
***Johannes Gasser**, Senior Partner, Gasser Partner Rechtsanwälte*
***Richard Wilson KC**, Barrister, Serle Court*

PLANNING FOR THE PHOENIX FAMILY: REBUILDING, RESILIENCE AND GOVERNANCE

16:50 - 17:30
Sala Regina

Some families don't just preserve wealth: they have to rebuild it. Whether from business failure, relocation, asset loss, divorce, or personal tragedy, setbacks often carry financial, reputational, legal, and human costs, with impacts that can ripple across generations. This session explores how planning can help families withstand shocks and recover. We will examine family governance frameworks, constitutions, pre- and post-nuptial agreements, liquidity planning, and emergency response strategies.
***Nicholas Jacob**, Partner, Forsters*
***Berenice Carrasquedo**, Founding Partner, BFC Asesores*
***Marco Toracca**, Global Director, Sotheby's*
***Giuseppe Ciucci**, Executive Chairman, Corient*

MOVE TO BREAKOUTS

17:30 - 17:35
Sala Pergami, Sala Regina, Sala Napoleone, Sala Torlonia

HIDDEN RISKS IN ART COLLECTIONS: KEEPING TRANSACTIONS ON TRACK

17:35 - 18:35
Sala Pergami

Every major art collection presents some level of provenance, condition, or documentation challenge. This session provides practical guidance for trusted advisors on identifying and addressing common issues before they derail planned sales, charitable gifts, estate distributions, or other collection-related transactions.
***Willem-Joost de Gier**, Co-Founder, Cadell*
***Marta Cenini**, Of Counsel, Maisto e Associati*

AGENDA

Thursday continued
12 NOVEMBER 2026

DO WE STILL NEED TRUSTS?

17:35 - 18:35
Sala Regina

Between the heresy/unreality that the answer to this question is “NO” and the usual pressures of litigation results and fiscal and regulatory measures as they relate to ‘offshore’ trusts, is there a more useful understanding of this recurring question? What are modern family trusts and related fiduciary structures intended to achieve in present circumstances and when and how do they do so? Trusts, foundations, and hybrid structures inevitably evolve and are doing so before our eyes. This session will explore their comparative advantages, emerging trends, the rise of alternatives such as the Dubai foundation and the extent to which they answer issues raised in the context of modern UHNW families.

***Andrew De La Rosa**, Barrister and Attorney, ICT Chambers*
***Raul-Angelo Papotti**, Partner, Chiomenti*

GIVING… BUT NOT FOR GOODNESS’ SAKE

17:35 - 18:35
Sala Napoleone

We often ask clients how they want to use their wealth, and they frequently have no idea. When wealth exceeds need, what are they creating? Many turn to philanthropy not purely out of altruism, but to avoid spoiling their children, bypass family tensions, or navigate forced heirship rules. This session explores how giving is shaped across jurisdictions, from cultural norms to legal constraints, and how advisers can guide clients toward meaningful impact - even when motives are mixed.

***Joshua Rubenstein**, Partner and Global Chair, Katten Muchin Rosenman*
***Giles Baxter**, Managing Director, Head of Technical Trust, RBC Trust Company*

PROTECTOR POWERS REWRITTEN

17:35 - 18:35
Sala Torlonia

Protector powers have evolved, raising key questions for modern trust drafting. What are the implications of wide versus narrow powers? Does silence in the trust deed imply broad authority? How should deadlock scenarios be managed, and should protectors now be treated as fiduciaries? This session explores the practical and legal consequences of these developments.

***Natasha Kapp**, Partner, Carey Olsen*
***Anthony Poulton**, Partner, Baker McKenzie*

WELCOME DRINKS

19:30 - 20:30
Lobby

DINNER

Hosted by Praxis

20:30 - 22:30
La Veranda

friday

13 NOVEMBER 2026

BREAKFAST

07:00 - 08:50
La Veranda

OPENING COMMENTS

08:50 - 09:00
Sala Regina

***Beatrice Puoti**, Partner, Stephenson Harwood*
***Jonathan Speck**, Senior Partner, Mourant*

FIRESIDE CHAT

09:00 - 10:00
Sala Regina

***Dame Elizabeth Gloster**, One Essex Court*
***Elspeth Talbot Rice KC**, Barrister, XXIV Old Buildings*

CAPITALISM VS SOCIALISM

10:00 - 10:30
Sala Regina

We are seeing a lot of talk of the rise of socialism and the failures of capitalism worldwide. This session sees the return of our popular debate, this time examining how these issues affect our clients and practices.
***Jonathan Speck**, Senior Partner, Mourant*
***Dakis Hagen KC**, Barrister, Serle Court*
***Clare Maurice**, Senior Partner, Maurice Turnor Gardner*

COFFEE BREAK

10:30 - 10:50
Sala Regina

RELAX, YOU'RE STILL BILLABLE: ADVISING IN THE AGE OF AI

10:50 - 11:30
Sala Regina

The AI debate may feel repetitive, but its implications for legal practice are profound. This session goes beyond theory to explore how lawyers can harness AI ethically and efficiently, improving client service, embracing technological change, and staying ahead in a rapidly evolving landscape. At the same time, we will examine the new risks AI introduces: clients checking advice on tools like ChatGPT, questions around privilege and confidentiality, and emerging issues that many have yet to anticipate. This is a practical discussion about balancing opportunity, responsibility, and professional protection in the age of AI.
***Patricia Guerra**, Partner, MLL Legal*
***Gilead Cooper KC**, Barrister, Wilberforce Chambers*
***Craig MacIntyre**, Director, Co-Head of Bermuda Private Client and Trust, Conyers*
***Omar Puertas-Álvarez**, Legal Innovation Partner, Harvey AI*



friday continued

13 NOVEMBER 2026

MIND GAMES: WEAPONISING CAPACITY

11:30 - 12:10
Sala Regina

When capacity is challenged, the stakes can be high. This session explores how influence can be misused, from undue influence and gaslighting to fraudulent calumny, elder abuse, and the coercive impact of cults on mental capacity. Drawing on real-world war stories and highlighting differences between common law and civil law approaches, we examine how advisers can spot, prevent, and respond to attempts to weaponize vulnerability.
***Philippe Pulfer**, Partner, Walder Wyss*
***John Teitler**, Partner, Teitler & Teitler*
***Heather Tibbo**, Chief Executive Officer, Crestbridge Fiduciary*
***Charles Lloyd**, Partner, Harbottle & Lewis*

MOVE TO BREAKOUTS

12:10 - 12:20
Sala Napoleone, Sala Pergami, Sala Regina, Sala Torlonia

EMERGING JURISDICTIONS

12:20 - 13:20
Sala Napoleone

In a world reshaped by conflict, sanctions, and political uncertainty, jurisdictions are competing aggressively to attract wealthy individuals and families. This session explores how newer jurisdictions (from New Zealand to the Cook Islands and beyond) position themselves through lifestyle offerings, tax incentives, legal frameworks, and the perceived strength of the rule of law. We will examine the strategies driving this “race for the wealthy,” the opportunities these emerging jurisdictions present, and the practical risks advisers need to navigate. From privacy and asset protection to regulatory compliance and reputational considerations, this session provides insights to help clients move, and thrive, safely in an increasingly complex global landscape.
***Elina Filippou**, Partner, Zepos & Yannopoulos*
***Alain Nijs**, Partner, NijsDraye, Belgium*

THE WILLS CONUNDRUM

12:20 - 13:20
Sala Pergami

How many wills are enough? This session explores the challenges of planning across jurisdictions, including local versus foreign assets and the complexities posed by civil law systems such as Roman law.
***Andrea Zavos**, Senior Partner, Boodle Hatfield*
***Daniel Bader**, Partner, Bär & Karrer*

HIDDEN WEALTH: TRUSTS, FOUNDATIONS AND DIVORCE

12:20 - 13:20
Sala Regina

This session explores how parties may attempt to limit full disclosure in divorce proceedings, with a focus on trusts, foundations, and cross-border issues. We will examine asset protection strategies, heirs' rights, and approaches in key jurisdictions such as Italy and France, including clawback risks and the treatment of foundations.
***Mark Harper**, Partner, Hughes Fowler Carruthers*
***Camilla Baldwin**, Founding Partner, Camilla Baldwin*
***Kinga Weiss**, Partner, Walder Wyss*

WHEN FAMILY DISPUTES BECOME A TAX RISK

12:20 - 13:20
Sala Torlonia

Tax and personal planning can be upended by family disputes that spill into litigation. Inheritance rifts or clashes over family wealth management often force disclosures that catch the eye of tax authorities, turning a private conflict into audits, assessments, and potential erosion of family wealth. The Bettencourt affair (also the subject of a Netflix series) is a cautionary tale: once intimate facts go public, control is lost. Even when you are convinced you are in the right, it is essential to consider the potential tax repercussions before initiating legal action. In some cases, avoiding litigation may be the wisest choice to prevent collateral damage that could ultimately prove more harmful than the dispute itself.
***Sonia Velasco**, Partner, Cuatrecasas*
***Nathalie Vetsch-Cevallos**, Partner, Lenz & Staehelin*

LUNCH *Hosted by Christie's*

13:20 - 14:30
La Veranda

LEISURE ACTIVITIES

14:30

A wine tasting of Lynch-Bages, *hosted by GM Jean-Charles Cazes and Cadell+Co* — Napoleone
Tennis tournament, *hosted by MLL* — Tennis Courts
Guided walking tour of Como — Lobby

15:00 - 16:00

Cooking class, fresh pasta making — Villa d'Este Kitchen

CHAMPAGNE RECEPTION *Hosted by Carey Olsen*

19:00 - 20:00
Lobby

GALA DINNER

Hosted by Corient

20:00
Impero

DANCING

22:30
Club

AGENDA

Saturday
14 NOVEMBER 2026

LA MATTINA DOPO LA FESTA

10:00 - 11:55
La Veranda

Our popular 'morning after the party' session returns, to touch on key topics which have not had enough consideration throughout the rest of the conference, raise new and pertinent ideas, and deep-dive into relevant cases. Come to this session armed with anything you wish to discuss in greater detail.
***Shân Warnock-Smith KC**, Barrister, ICT Chambers/* 5 Stone Buildings
***Piers Barclay**, Partner, Macfarlanes*

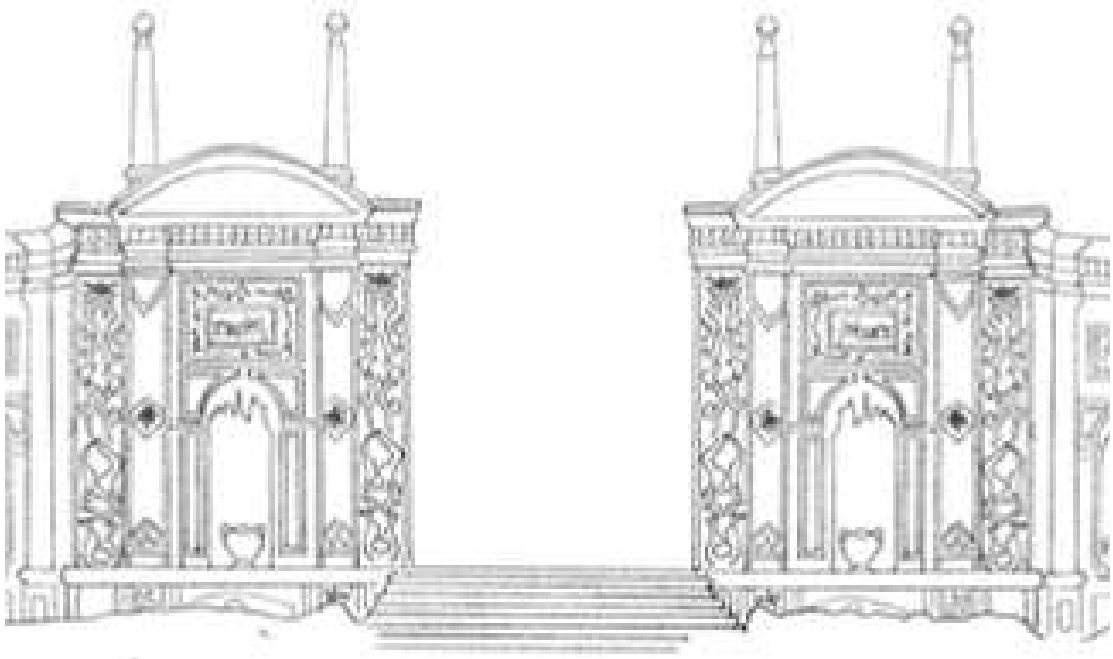
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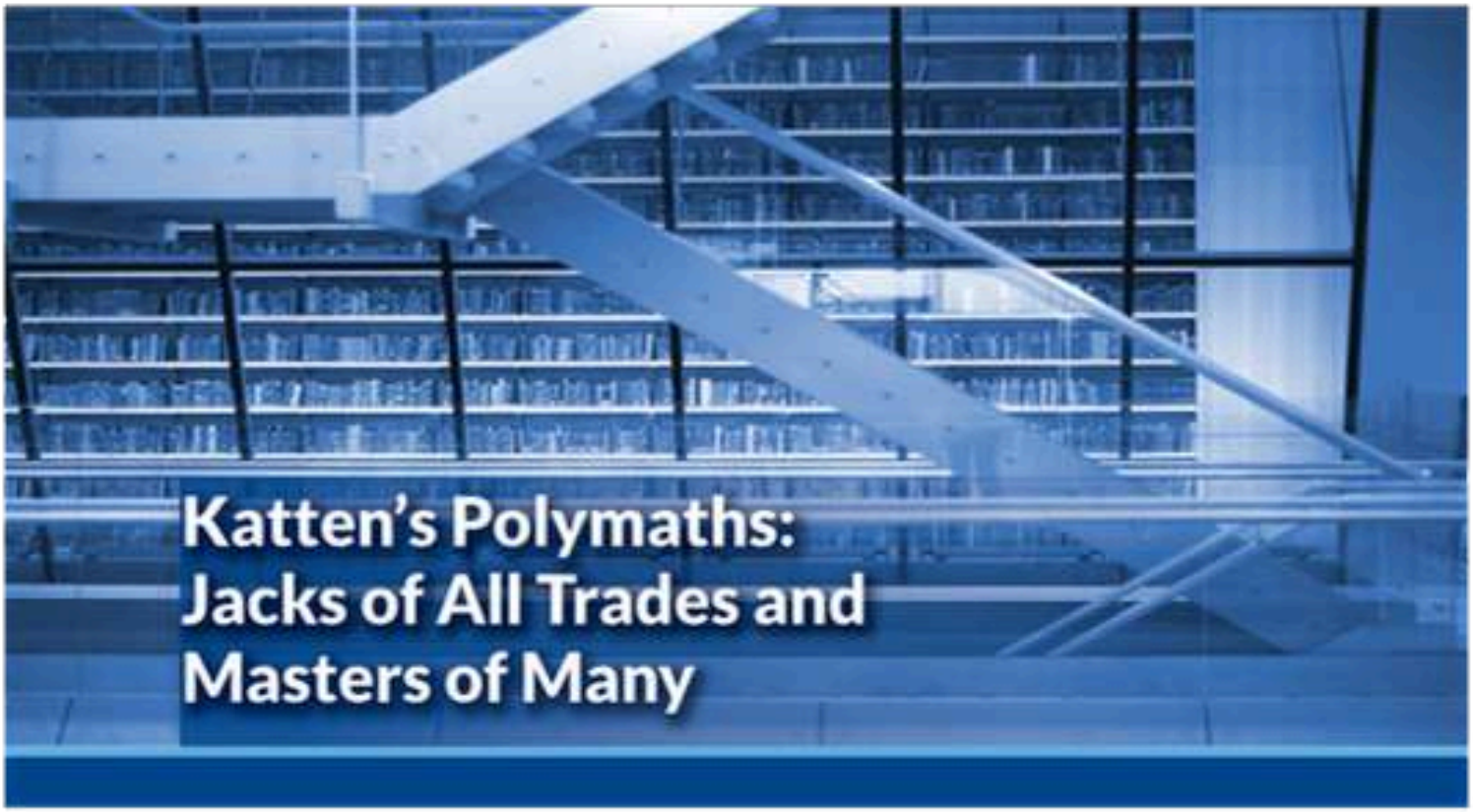
11:55 - 12:00
La Veranda

***Beatrice Puoti**, Partner, Stephenson Harwood*
***Jonathan Speck**, Senior Partner, Mourant*

FAREWELL LUNCH AND CLOSE OF CONFERENCE

12:00 - 13:00
Impero





Katten's Polymaths: Jacks of All Trades and Masters of Many

Our Private Client Services attorneys have extensive knowledge in sophisticated wealth management strategies that span planning, administration and, when necessary, litigation for our clients across the globe.

We believe, however, that our best asset is our ability to learn about you and create a customized wealth management plan to meet your specific needs. In doing so for our clients, we have amassed a plethora of knowledge that spans many industries and fields of endeavor. We're proud to be called a team of polymaths.

Katten

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KEYNOTE SPEAKER



Dame Penny Mordaunt

Former Secretary of State for Defence of the United Kingdom

Rt Hon Dame Penny Mordaunt DBE PC was a Parliamentarian for 14 years, holding nine ministerial roles, four in Cabinet. She now has a portfolio career working in business, defence, development, investment, media and philanthropy. This includes Chairing the Financial Services firm Opera, the defence firm Subsea Craft and the Coalition for Global Prosperity. As Global Ambassador for the Team Lewis Foundation she helps provide support to 3000 charities across the world.

She was Secretary of State for Defence, for International Development and Minister for the Armed Forces and sat on the UK's National Security Council. As Paymaster General she was the UK's first defensive cyber lead. She headed the UK's civil contingencies and rewrote the UK's resilience strategy post covid. As a local Government Minister, she had responsibility for the fire service. Her experience spans disaster and humanitarian relief, disease outbreaks, terrorist attacks and all UK defence operations and force generation. She has chaired COBRA, NATO and the EU Battle Group exercises. She was a Royal Navy Reservist for 10 years and an honorary officer for six, affiliated to our Mine Hunters and bomb disposal divers. She retains a support role with the Royal Navy as part of Barham Squadron.

She supported Brexit and pioneered State-level deals with the US in lieu of a trade deal. As Minister for health, work and disabled people she devised the health and work road map which saw 1 million disabled people into work and founded the Global Disability Summit. She was the UK Governor at the World Bank.

She came to the public's attention as Leader of the Commons and Lord President of the Council, presiding over the Accession Council following the death of Queen Elizabeth II and at the coronation of King Charles III. She is a double best-selling author and her latest book Pomp & Circumstance argues why the UK is well placed to weather the rapid pace of change and uncertainty which marks our times.

SPEAKER



Dame Elizabeth Gloster

One Essex Court, UK

The Rt. Hon. Dame Elizabeth Gloster DBE, PC practised as a commercial and Chancery QC at One Essex Court from 1991 until 2004, before accepting an appointment as a High Court judge, becoming the first woman to be appointed a judge of the Commercial Court. She was appointed to the Court of Appeal in 2013 and became Vice-President of the Civil Division in 2016. In 2018, Liz returned to One Essex Court to practise as a full-time international commercial arbitrator. She has been appointed both as chair and co-arbitrator in a wide range of international arbitrations including insurance/reinsurance, banking, energy, construction, joint venture and investment disputes.



DELEGATE PROFILES



Alexandra Adrot-Castorina

Partner, Adrot-Castorina Bonnet Avocats, France

Alexandra Adrot-Castorina is a Partner at Adrot-Castorina Bonnet Avocats. Alexandra is a French qualified lawyer with a background shaped across France, the UK, and Italy. After years spent in the M&A teams of international law firms, she made the decision to focus on private clients over twelve years ago. Today, she assists international families with all their tax and legal concerns, collaborating with their trusted advisors, or introducing reliable partners to help them decipher and navigate an increasingly complex world. Alexandra's expertise spans ever-evolving areas, from international taxation and estate planning to the structuring and management of real estate investments. She also anticipates and addresses family disputes, delves into issues related to digital assets, and explores gender-related challenges. Curiosity, creativity, and collaboration with esteemed colleagues she both values and respects: that is her perfect recipe for professional happiness!



Iñigo Aguirrezabala

Partner, Cuatrecasas, Spain

Íñigo Aguirrezabala is a Partner at Cuatrecasas. He specializes in advising on the tax aspects of investment and asset structures for national and international investors. He regularly advises family offices, private equity funds, family businesses, funds and high-net-worth individuals on their transactions and on structuring their investments. He also advises individuals and families on organizing their personal and business assets and on their inheritance planning. He spent over four years working in the US, enabling him to acquire extensive knowledge of international taxation, particularly of the investment vehicles and structures used by European, US and Latin American investors. His practice includes defending taxpayers' interests in tax inspection proceedings. He has been lecturing on international taxation in the Master in Tax Consultancy at Universidad de Navarra since 2018. He speaks regularly at conferences on taxation and at international forums, including IBA, ABA and STEP. He is the author of important legal publications and articles in national and international journals.



Bryan Andersen

Senior Vice President, The Bryn Mawr Trust Company of Delaware, USA

Bryan Andersen is a Senior Vice President at The Bryn Mawr Trust Company of Delaware, with nearly 30 years of experience advising families in the global private wealth arena. Throughout his career, he has worked closely with ultra-high-net-worth individuals and families across multiple jurisdictions, helping them navigate complex investment, fiduciary, and generational considerations. As Director of Investment Services and Relationship Management, Bryan leads a multidisciplinary team of trust professionals specializing in long-term wealth structuring and governance. Operating within the internationally recognized framework of Delaware trust law, he partners with families to thoughtfully align financial strategy, family values, and legacy objectives—supporting continuity and stewardship across generations.



Hannes Arnold

Senior Partner, Gasser Partner Rechtsanwälte, Liechtenstein

Hannes Arnold is a Senior Partner at Gasser Partner Rechtsanwälte. With recognized expertise in corporate law, he advises international companies, families, and family offices on all aspects of wealth and corporate structuring and has extensive experience in complex domestic and cross border M&A transactions, corporate relocations, and financings. His strong expertise in financial markets law gives him a deep understanding of the key challenges facing complex international structures today. In addition to his advisory work, Hannes Arnold represents clients in sophisticated international litigation and arbitration proceedings, particularly in the areas of foundation and trust law, as well as asset tracing and recovery. He is a notary public and ISDA Opinions Counsel for Liechtenstein.



Eesha Arora

Partner, Maurice Turnor Gardner, UK

Eesha Arora is a Partner in the Private Wealth team at Maurice Turnor Gardner. Eesha's clients benefit from her expertise in advising on the succession and structuring of their global wealth. Eesha is ranked in both Chambers & Partners (HNW) and Legal 500.



Jonathan Arr

Partner, Macfarlanes, UK

Jonathan Arr is a Partner at Macfarlanes. Jonathan specialises in international contentious trust, probate and succession disputes, high-value family disputes and commercial litigation. He acts on the full range of matters affecting private clients and their structures, seeking to manage and resolve the most difficult disputes in relation to the most complex structures. He acts for high-net-worth individuals from the UK and around the world as well as trustees, protectors, wealth managers and multinational businesses.



Emilie Aubert

Senior Associate, Lenz & Staehelin, Switzerland

Emilie Aubert is a Senior Associate at Lenz & Staehelin's Lausanne office where she is a member the firm's Private Clients and Tax groups. She advises clients on domestic and international transactions relating to corporate and commercial matters. She also offers advice on tax law with a focus on private clients.



Bruno Bächli

Partner, Wenger Vieli, Switzerland

Bruno Bächli is a Partner at Wenger Vieli. He advises private clients on Swiss and cross-border tax matters, with a particular focus on income and wealth taxation, succession, and international gift and inheritance tax. He also advises family-run businesses on profit and capital tax, and collectors on the taxation of artworks. His experience in a Big Four US tax team informs his advice to clients investing in, or temporarily active in, the United States. He advises investment funds and their investors on tax matters, particularly in cross-border contexts. Bruno is a partner and Certified Tax Expert at Wenger Vieli.



Daniel Bader

Partner, Bär & Karrer, Switzerland

Daniel Bader is a Partner at Bär & Karrer, co-heading the tax department and the St. Moritz office. He advises Swiss and international clients on tax law, succession planning, and private client matters. His expertise includes inheritance tax, trusts, estate planning, and wealth structuring across jurisdictions. He frequently speaks at tax and private client conferences and serves on the boards of Family Offices. Daniel is a member of the Supervisory Board of the International Fiscal Association (IFA) and a fellow of the American College of Trust and Estate Counsel (ACTEC). Recognized by Chambers, Legal 500, and Citywealth, he was named “Lawyer of the Year – Switzerland 2025” by IFC Citywealth. Who's Who Legal lists him as a top expert in “Private Client” and “Corporate Tax.”



Richard Bagnall-Smith

Founding Director, Cadell, UK

Richard Bagnall-Smith is a Founding Director of Cadell. He's responsible for Client relationships, along with Willem de Gier and has developed a client base amongst Lawyers, Trustees, Private Banks and Family Offices in London, Geneva, Zurich, Monaco, Lausanne, New York, Chicago, Jersey, Guernsey and the Isle of Man. Cadell is deliberately a discreet, bespoke, elite service, focused on advising Private Client Professionals and their UHNW art collector clients. Whilst conflicts of interest are endemic in the art market, Cadell does not deal, broker or accept Introductory Commissions. Our focus is to provide Private Client Professionals and their clients with truly independent estate planning advice on their art collections and manage any subsequent transactions via a formal competitive sale process. Cadell has 37 senior experts across 34 sectors, almost all of whom are former Dept Heads at Sotheby's or Christie's. No other art advisor comes close to this level of expertise. In 2020 Cadell won the STEP Boutique of the Year Award and was a Finalist again in 2023. In 2022 Cadell became the leading European art adviser having managed the sale of over $220m. In 2022 Cadell opened in New York and was chosen to manage the $100m Sir Jeffrey Hotung Collection. Richard is recommended by Private Client Global Elite and Spears.



Camilla Baldwin

Founding Partner, Camilla Baldwin, UK

Camilla Baldwin is the Founding Partner of Camilla Baldwin. Camilla is a distinguished international family lawyer renowned for her expertise with high-net-worth and ultra-high-net-worth clients. She specialises in all aspects of family law, including divorce, prenuptial agreements, and child-related disputes. Camilla is celebrated for her empathetic approach and exceptional diligence. Camilla is a Cambridge alumna and former Judge who founded Camilla Baldwin in 2005, driven by her commitment to achieving outstanding results. Camilla founded the charity Not Beyond Redemption in 2020 to provide pro bono legal advice to mothers in prison and support them until their children reach adulthood. Camilla actively contributes to the global legal community. For the past three years, she has co-chaired the Cambridge Forum on International High-Net-Worth Family Law. She lectures internationally on divorce and high-net-worth and ultra-high-net worth families. Camilla is a leading family lawyer.



Piers Barclay

Partner, Macfarlanes, UK

Piers Barclay is a Partner and is the Head of Private Client at Macfarlanes. 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 and associated mechanisms on arrival, both for entrepreneurs and for other high-net-worth individuals. Piers is also involved in the post-death administration of estates, both in the UK and in the international context. Before becoming a partner, Piers spent six months on secondment in the trusts department of a leading international law firm. Piers is ranked as a Tier One adviser in the UK and Global editions of the independent Chambers guide and as a leading individual in the UK Legal 500 guide. He has been recognised in the eprivateclient 2021 50 Most Influential list and is recommended in the 2021 Private Client Global Elite guide. Piers is a member of STEP (Society of Trust and Estate Practitioners).



Alessandro Bavila

Partner, Maisto e Associati, Italy

Alessandro Bavila is a Partner at Maisto e Associati. Alessandro is admitted to the Bar in Italy. He obtained an LL.M. Degree in Tax from the University of London and worked afterwards at the IBFD of Amsterdam as IFA researcher before joining Maisto e Associati. He has consolidated expertise in international taxation, personal and estate planning, trusts, and taxation of individuals by and large, and is regularly invited as a speaker at conferences and seminars on tax topics. He is a member of TIAETL (International Academy of Estate and Trust Law) and PAIAM (Professional Advisors to the International Art Market), as well as an international Fellow of ACTEC (American College of Trust and Estate Counsel). Since 2023, he is member of the board of the Italian branch of STEP (The Society of Trust and Estate Practitioners), of which he was previously member of the Scientific Committee.



Giles Baxter

Managing Director, Head of Technical Trust, RBC Trust Company, Jersey

Giles Baxter is the Managing Director and Head of Technical Trust for RBC's International Trusts business, based in Jersey. As a Director, he leads the technical trust function overseeing legal, fiduciary and tax matters for some of the bank's most complex client situations. His expertise in translating intricate legal and technical considerations into robust governance frameworks and improved client outcomes helps ensure exceptional service and proactive risk mitigation across the client lifecycle. Dual qualified as an English solicitor and Jersey Advocate (non-practising), Giles brings deep jurisdictional expertise and cross-border trust experience. He holds an LLB in Law and a BSc in Maritime Business. Prior to joining RBC, he was a partner at an established Jersey law firm, where he specialised in trust, corporate and commercial matters, including complex litigation. He holds memberships in STEP, the Law Society of England and Wales, and the Jersey Law Society.



Jack Bernstein

Senior Partner, Aird & Berlis, Canada

Jack Bernstein is a Senior Partner and Chair of International Tax practice at Aird & Berlis. He is one of Canada's preeminent tax lawyers. He is Head of the Aird & Berlis International Tax Group and member of the firm's Tax Estates & Trusts and Tax Litigation Group. Jack advises on complex estate plans, sophisticated reversible freezes; family succession; and informal mediation of family disputes. He works on family shareholders agreements, pre- and post-nuptial and cohabitation agreements, family trusts, family partnerships and family estate planning. He also helps clients plan for marriages and divorces and emigration and immigration. Jack assists family businesses on transactions and on investments and expansion of businesses. He also assists with breakups of businesses, buyouts of family members and other shareholders and spin off transactions for family businesses. Jack sits on family advisory committees and has assisted in the setup of family offices. Jack's clients have included dozens billionaires; famous musicians; some of the wealthiest families in Hong Kong, Germany, Japan, Kazakhstan, Poland, Ukraine, Mexico and Israel; presidents of public companies; hedge fund managers, and entrepreneurial clients with businesses worth over $100 million.



Nicolas Bracher

Partner, Wenger Vieli, Switzerland

Nicolas Bracher is a Partner at Wenger Vieli and a Swiss Bar Association-certified specialist in inheritance law. He advises individuals, families, and entrepreneurs on estate planning, succession matters, and private wealth issues, drawing on extensive expertise in banking and asset management law. As an experienced litigator, he regularly represents clients in complex estate, shareholder, and banking disputes. Nicolas serves as an executor, estate administrator, and trustee, and sits on the boards of several private and charitable foundations. He advises founders and foundations on establishment, governance, and ongoing legal affairs, combining legal expertise with practical experience in the creation and management of charitable organizations. He co-heads Wenger Vieli's Private Clients and Dispute Resolution practice groups. He regularly contributes to academic publications in his areas of expertise and speaks at professional conferences and educational events.



Stuart Bray

Senior Client Services Director, Butterfield Trust, Guernsey

Stuart Bray is a Senior Client Services Director at Butterfield Trust, Guernsey and serves on the trust company board. With over 27 years of offshore trust experience, he has held senior leadership roles in Guernsey, Mauritius and the Cayman Islands, advising private and institutional clients on international wealth structuring and fiduciary solutions. Stuart joined Butterfield in 2018 following the acquisition of Deutsche Bank's offshore trust business and holds professional qualifications from the Chartered Governance Institute UK & Ireland and STEP.



Alberto Brazzalotto

Partner, Maisto e Associati, UK & Italy

Alberto Brazzalotto is a Partner at Maisto e Associati and heads the firm's London office. He specialises in international tax planning, with a particular focus on high-net-worth individuals, family-owned businesses, clients in the arts and sports sectors, and intellectual property-related matters. He has extensive experience advising on complex cross-border issues, including family wealth structuring, succession planning, generational transfers and trusts. Alberto advises Italian and international clients on both advisory and contentious tax matters, assisting them throughout the entire process - from strategic planning and pre-litigation to the resolution of tax disputes, including settlement procedures and negotiated agreements with the tax authorities. Since 2023, he has been a Trust and Estate Practitioner (TEP) and a member of the Italian branch of STEP.



Anna Bruce-Smith

Director, Conyers, Bermuda

Anna Bruce-Smith is a Director at Conyers Dill & Pearman. Anna's practice covers all areas of private client and trust law with a particular focus on international trusts and trust reorganisations. Anna's expertise includes advising on the establishment of international trust structures and private trust company structures, trust restructuring matters and providing advice to individual and corporate trustees about their duties and obligations. She is a member of the Society of Trust and Estate Practitioners



José Calejo Guerra

Partner, CCSL Legal, Portugal

José Calejo Guerra is a Partner at CCSL Legal. José has a track record on advising domestic and international clients, dealing with the tax implications of their operations and supporting such clients with complying with their tax obligations. He has been also very involved in dealing with private clients and SME's in the jurisdictions covered by the firm.



Berenice Carrasquedo

Founding Partner, BFC Asesores, Mexico

Berenice Carrasquedo is the Founding Partner at BFC Asesores. With experience in public and private trusts, real estate development and structuring of credit, Berenice has participated in the formation of the first trusts of the development banks to manage defined contributions. Before starting her own firm, she spent time with Garcia Madrazo y Asociados, SC and the Financial Commission in CONCAMIN (Confederación de Cámaras Industriales de los Estados Unidos Mexicanos). She is involved in working with family businesses, family protocol, and structuring in Mexico and Foreign Jurisdictions. Berenice has held many positions with STEP including: former Chairman of the Mexican, former Deputy Chairman of STEP Caribbean and LatAm Region, and permanent member of the Board of the STEP LatAm Conference.



Florentino Carreño

Partner, Cuatrecasas, Spain

Florentino Carreño is a Partner at Cuatrecasas and is based in Madrid, Spain. He specializes in private client and tax law and is an expert in asset structuring across countries and generations. He also provides advice on the structuring of family offices, private equity, hedge funds, and insurance. Florentino is an academician of The International Academy of Estate and Trust Law, where he served as President from 2020 to 2022. Additionally, he is an elected international fellow of the American College of Trust and Estate Counsel. He established the London office of Cuatrecasas, where he worked for three years. This experience enabled him to acquire in-depth knowledge of common law wealth structures while advising national and international clients, particularly those from the UK, US, Canada, and Latin America. He lectures on Tax Law and European tax harmonization in Master's programs at the University of Navarra and Universidad Carlos III, where he is a member of the Academic Council.



Alex Carruthers

Founding Partner, Hughes Fowler Carruthers, UK

Alex Carruthers is a Founding Partner at Hughes Fowler Carruthers. He specialises in complex divorce and financial work and children's work, in particular in international cases. His clients are high net worth individuals with complex legal issues including trusts and jurisdictional disputes. Alex helped set up the Young Solicitors Family Law Association in 1998. He is a member of Resolution, the International Bar Association and a fellow of the International Academy of Family Lawyers. Alex is a qualified mediator and collaborative lawyer and is featured in Spear's Family Law Index's 'Top Recommended Family Lawyers' list. Alex is also listed in Tatler Address Book's Advisory as one of the leading family lawyers in their trusted network of influential and elite private client experts with "gilt-edged" expertise. He is a trustee of the Royal Courts of Justice Citizens Advice Bureau and a regular commentator and speaker on family law.



Marco Cerrato

Partner, Maisto e Associati, Italy

Marco Cerrato is a Co-Managing Partner of Maisto e Associati and is an Italian tax lawyer based in Milan. Marco has a diverse practice spanning contentious and non-contentious matters, working closely with banks, family offices, high-net-worth individuals, and international families. His expertise includes generational planning, lifetime asset transfers, trust taxation, cross-border tax residence, and taxation of art collections and philanthropic activities. He serves as the scientific co-director of the advanced training program on Protection, Transmission and Management of Family Estates, organized by the Catholic University. He lectures and coordinates the advanced course on International Management of Family Wealth at the International University of Monaco. He is involved in STEP as member of the Policy Committee Worldwide and as Chair of the European Region. Marco has been appointed by the Italian Presidency of the Council of Ministers and the Ministry of Economy and Finance to contribute to various tax reform initiatives.



Judith Chatoo

Head of Private Clients, Saffery Trust, Switzerland

Judith Chatoo is the Head of Private Client at Saffery Trust. Judith is a UK qualified Solicitor with over 30 years in estates; succession planning in the UK, the Cayman Islands and Switzerland. Judith has extensive experience with Middle Eastern families and their family offices. She sits on the board of several Charitable Foundations, as well as acting as a trusted family adviser – coordinating other service providers to realise large complex, and often multi-jurisdictional projects, such as family funds, significant property transactions and investment purchases. She has also assisted her clients with elements of family governance. Judith has held Director positions for over 16 years, representing both independent and bank owned trust companies and is a member of the executive committee of the Swiss Association of Trusts & Companies (SATC).



Jacqui Cheshire

Partner, Corient, Switzerland

Jacqui Cheshire is a Partner at Corient. She has extensive experience helping wealthy families and individuals manage everything from wealth planning to business activities and from property to art collections and philanthropy across structures and jurisdictions. Jacqui's experience includes positions with Stonehage Fleming in London and Geneva, as well as Deloitte in South Africa. Jacqui has a Bachelor of Business Science degree from the University of Cape Town and a higher diploma in Tax Law from the University of the Witwatersrand.



Eleni Christou

Counsel, Lenz & Staehelin, Cyprus

Eleni Christou is Of Counsel at Lenz & Staehlin. Alongside her banking and finance work, Eleni regularly advises individuals, family offices and trustees on all aspects of wealth planning, corporate governance and corporate structuring in both international and domestic contexts. As a UK solicitor, Eleni started her career in London where she worked in the capital markets department of Linklaters LLP, as well as the General Counsel's Office of major investment banks in London and in Tokyo. There, she specialised in capital markets transactions, and in particular derivatives and structured products.



Giuseppe Ciucci

Partner, Executive Chairman of EMEA, Corient, Jersey

Giuseppe Ciucci is a Partner and Executive Chairman of EMEA at Corient. His experience includes positions with Stonehage Fleming and Deloitte & Touche. Giuseppe helped Stonehage Fleming to develop an extensive range of expertise and cross-border services, which enabled the Group to become one of the leading Family Offices in the world. Giuseppe holds Bachelor of Commerce and Bachelor of Law (cum laude) degrees from the University of Stellenbosch, South Africa and was admitted as an Advocate of the Supreme Court of South Africa. He also earned a Graduate Diploma in Accountancy from the University of Cape Town, South Africa and held the Chartered Accountant designation.



Russell Cohen

Partner, Farrer & Co., UK

Russell Cohen is a Partner at Farrer & Co. Russell has over twenty years of experience in advising clients how to navigate the complexities of private wealth. He advises clients on how best to structure their wealth, including wealth preservation, tax and succession planning. He has a personable and collaborative style, and is known for advice that is practical and pragmatic. He is head of international strategy at Farrer & Co.



Jonathan Conder

Partner, Stephenson Harwood, UK

Jonathan Conder is a Partner at Stephenson Harwood. Although based in London, most of Jonathan's clients are international, born outside the UK and/or living outside the UK with assets and other family members in more than one jurisdiction. As a result he is very experienced in complex cross-border issues, coordinating matters for clients who are affected by different legal and tax systems. He also has significant experience in assisting families and trustees in responding to tax investigations and resolving tax, trust and wealth disputes. Jonathan has spent most of his career as a lawyer in private practice, but he also worked for four years as an in-house counsel to a bank in Bermuda. As a result, he puts forward practical structuring solutions to his clients, be they individuals or private banks and corporate trustees, considering both perspectives. Jonathan is a well known and highly regarded figure in the private wealth community. He travels widely to see clients in the UK and overseas and regularly chairs conferences attended by clients and other industry professionals. He also publishes journal articles on topical issues and is frequently quoted in the national and industry press.



James Cook

Partner, Russell Cooke, UK

James Cook is a Private Client Partner at Russell Cooke. He advises on estate and succession planning, wills, probate, trusts, tax-planning, lasting powers of attorney, enduring powers of attorney and Court of Protection matters. His work often includes international elements whereby he advises both UK and non-UK clients. He is a member of the Society of Trust and Estate Practitioners, a student member of the Association of Taxation Technicians and was named in eprivateclient's Top 35 under 35 classes of 2017 and 2018.



Gilead Cooper KC

Barrister, Wilberforce Chambers, UK

Gilead Cooper KC is a Barrister at Wilberforce Chambers. Before coming to the Bar, Gilead enjoyed a brief career in publishing, editing books on photography, popular science and astronomy. He also spent a couple of years teaching in pre-revolutionary Iran. After pupillage, he worked in the Litigation Department of Freshfields for three years before returning to the Bar to take up a tenancy at 7 New Square. He joined Wilberforce Chambers in 2015. “The Rolls-Royce silk of the Chancery Bar,” (The Legal 500, 2020) Gilead specializes in international trust and estates litigation. The latest (2022) edition describes him as “an intellectual giant”, and ranks him in Band 1 in all three of his main practice specialisms: Private Client Trusts; Probate, Offshore, and Art and Cultural Property. Gilead has a particular interest in digital assets and has written a number of articles about the legal issues raised by this rapidly developing technology. He was included in Cityweath’s recent list of the top 100 Crypto advisors and managers.



David Córdova flores

Partner, Charles Russell Speechlys, Luxembourg

David Córdova Flores is a Partner at Charles Russell Speechlys. David is a Luxembourg tax advisor with more than two decades of experience in Luxembourg and international matters, guiding clients through complex international tax planning and structuring matters. David acts for a varied client base and his work spans a wide range of industries and sectors. David advises high net worth individuals, multinational groups and investment funds on the structuring and implementation of their holding and financing platforms. He also has particular expertise assisting clients from Spain and Latin America using Luxembourg as a hub to hold their assets and structure their investments. Ranked in Chambers & Partners for his work in Private Wealth from 2021 to 2026 (currently, Band 2). He is fluent in English, French and Spanish.



Willem-Joost de Gier

Co-Founder, Cadell, UK

Willem-Joost de Gier is a Co-Founder of independent art advisory firm Cadell. He works with leading Lawyers, Trustees, Executors, Private Banks and Family Offices across Europe and beyond. Willem's many years on the Global Executive Management Board at Christie's helped shape Cadell's focus on providing high quality independent art advice to Private Client Professionals and their underlying clients. Cadell's protects clients from the costly conflicts of interest which are endemic to the art market and clearly differentiates itself by never dealing, brokering or accepting Introductory Commissions designed to distort competition. Cadell offers estate planning advice on art collections and manages transactions via a formal competitive tender process designed to maximise outcomes for clients. Willem started his career in Investment Banking (Corporate Finance) and Management Consulting. He was educated at Bristol University (BSc.), Warwick Business School (MBA) and INSEAD (Executive Leadership). In 2020 Cadell won the STEP Boutique of the Year Award. In 2022 Cadell became the leading European art advisory firm by value and opened in North America.



Andrew De La Rosa

Barrister and Attorney, ICT Chambers, Cayman Islands

Andrew De La Rosa is an English Barrister and Cayman Islands Attorney-at-Law. In both capacities he acts as independent counsel specialising in litigation and planning concerning fiduciary relationships in the trust, estate, company, collective investment and partnership spheres and related regulatory and fiscal matters. His practice has a very wide international element and he has deep experience of dealing with the laws of all of the principal English common law-based international financial centres and FTZs and the civil law and Islamic law-based systems with which they interact. Professional clients have described him as "awesome and absolutely compelling," "a great advocate and terrific strategist" and "charming and easy-going but with a deadly eye and known to get results." Andrew has acted as counsel in a number of the largest international inheritance and trust disputes of recent years and a series of trust, corporate and professional partnership restructurings.



Guadalupe Diaz-Sunico Aboitiz

Partner, Gomez-Acebo & Pombo, Spain

Guadalupe Diaz-Sunico Aboitiz is a Partner of Tax at Gómez-Acebo & Pombo. She represents high net worth individuals and families, with particular focus on sophisticated tax and estate planning matters and the structuring of cross-border family business affairs. She frequently advises on tax residence matters and assists families and individuals in their relocation to Spain. She has experience with a broad range of international tax and estate planning matters, including the taxation of more complex asset holding structures, such as trusts, private foundations, etc.



Javier Estella

Managing Partner, Avantia Asesoramiento Fiscal y Legal, Spain

Javier Estella is the Managing Partner at Avantia Asesoramiento Fiscal y Legal (Spain). Javier has over 33 years of relevant professional experience. He was a founding member of the Private Client Team of PricewaterhouseCoopers in Spain and partner in charge of the High Net Worth Individuals practice at EY Spain. His practice has gained significant recognition, including Chambers HNW 2024, 2023, 2022, 2021, 2020, 2019 Band 1 and from 2008 in Chambers, Chambers Europe, Legal Media group – Euromoney, Citywealth, Who's Who Legal, finalist and winner of STEP Awards. Consistently highlighted by specialist and mainstream Spanish media as a leading expert in Private Wealth. Member of Academic Council at FIDE and co-director of Private Wealth Forum in FIDE.



Elina Filippou

Partner, Zepos & Yannopoulos, Greece

Elina Filippou is a Partner and heads the private client practice of the Greek law firm Zepos & Yannopoulos. 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, with a particular focus on compensation mechanisms for founders and executives. Elina has been with Zepos & Yannopoulos since 2004 and is a member of the firm's executive committee.



Francesco Frattini

Partner, Gasparro Frattini e Associati, Italy

Francesco Frattini is a Partner at Gasparro Frattini e Associati. He is a lawyer and notary public in Italy. He is a founding partner at Gasparro Frattini e Associati, in Milano, and assists national and international clients in a wide range of matters involving real estate, tax and succession planning, trusts, family law, cross-border transactions, and corporate and commercial law. Clients include HNWI, global corporations and investment funds. He was admitted to the bar in 2005, became a notary public in 2011, and completed an LLM at KCL in 2013, focusing on finance, M&A and Trusts. He is a member of STEP, a member of The International Academy of Estate and Trust Law, and has been a member of the International Law Commission of the Italian National Notarial Council. He lectures nationally and internationally on multi jurisdictional cases.



Daniel Gabrieli

Partner, Wenger Plattner, Switzerland

Daniel Gabrieli is a Partner and Head of the Private Clients Practice Group of Wenger Plattner. With extensive expertise, he advises clients on wealth and estate planning, business succession, and inheritance divisions. Additionally, he supports the establishment and development of foundations and trusts. As a certified notary public, he also provides notarial services. Daniel Gabrieli also assists with relocations, residence permits, and real estate acquisitions. Furthermore, he offers support to asset managers and financial service providers regarding contract and financial market law issues.



Patricia Garcia Mediero

Partner, Avantia Asesoramiento Fiscal y legal, Spain

Patricia Garcia Mediero is the Leading Partner of the International Private Wealth practice at Avantia Asesoramiento Fiscal y Legal (Spain). Patricia was qualified as a UK tax practitioner at PwC London and practiced at PwC Spain. She was also a partner of the International Private Client practice at EY Spain. Her practice has gained significant recognition, including Chambers Europe, Chambers HNW, Legal Media group – Euromoney, Citywealth, Who's Who Legal, finalist and winner of STEP Awards and listed in Legal Week's Private Client Global Elite. Member of experts panel at EU Legal Affairs Committee. Member Judge at STEP Awards. Member of the Steering Committees at the International Wealth Advisors Forum and STEP Cross-Border Trust and Estates Special Interest Group.



Jean-Charles Gardetto

Managing Partner and Founder, Gardetto Law Offices, Monaco

Jean-Charles Gardetto is the Managing Partner and Founder of Gardetto Law Offices. Jean-Charles was admitted in Monaco in 1988 and was the President of the Monaco Bar. Jean-Charles practices family law (matrimonial, estates, child custody, child abuse, protection of vulnerable adults), immigration law, international private law, business law, and white collar crime. His clients include HNWI and Multinational companies. His practice has a strong international dimension. It includes litigation and advisory work. He also assists clients wishing to settle in Monaco. He holds an LL.M. from Cornell Law School and a DESS from the University of Aix-Marseille III. He was the Chairman of the External Relations Committee of the Monaco Parliament, (2003-2013) and the Vice-President of the Council of Europe and OSCE Parliamentary Assemblies. He is also a TEP and a member of the IAFL and TIAETL.



Johannes Gasser

Senior Partner, Gasser Partner Rechtsanwälte, Liechtenstein

Johannes Gasser is a Senior Partner of Gasser Partner Rechtsanwälte for 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 at the universities of Vaduz and Innsbruck, and his commentary on foundation law is considered by courts and practice as the leading authority. Johannes is a member (Trust Estate Practitioner) of the Society of Trust and Estate Practitioners (STEP), an academician of The International Academy of Estate and Trust Law (IAETL) and an International Fellow of the American College of Trust and Estate Counsel (ACTEC).



Alexandra Geiger

Partner, MME Legal, Switzerland

Alexandra Geiger is a Partner at MME Legal. As a certified inheritance specialist and TEP, Alexandra advises individuals and families in the areas of domestic and cross-border matrimonial and succession law, wealth and estate planning, estate administration as well as foundations and trusts. She acts as counsel in complex trust and estate disputes and serves as arbitrator. Alexandra brings extensive experience in advising global families, assists them with relocations, international succession planning, and the administration of global estates. Due to her three-year stay in Singapore, she is very familiar with advising Asian clients and has a comprehensive understanding of countries with common law systems. Alexandra is recommended in Chambers High Net Worth Legal Guide, Legal 500, Lexology Index as Thought Leader, and is listed in the Private Client Elite Directory.



Paolo Giacometti

Partner, Chiomenti, Italy

Paolo Giacometti is a Partner at Chiomenti, a leading Italian law firm. His practice covers a wide range of private client matters, including tax advisory, succession planning and family governance. Paolo's practice mostly focuses on international matters; he assists a number of Italian HNWI's and family offices with a variety of cross-border ramifications, as well as foreign individuals, families and trustees in respect of their Italian assets and investments.



Thomas Giordano-Lascari

Partner, Greenberg Glusker, USA

Thomas Giordano-Lascari is a Partner in Greenberg Glusker's Private Client Services Group with nearly two decades of experience in advising high-net-worth individuals and closely-held businesses with international income tax and estate planning issues. Highly regarded for his expertise in representing global families with footprints in multiple jurisdictions, Thomas assists clients in structuring their worldwide assets to maximize family objectives and minimize income and transfer taxes. Thomas frequently aids clients with pre-immigration planning, foreign investments in the United States, U.S. residency planning and management, and expatriation planning. He frequently provides sought-after guidance on foreign trusts to foreign fiduciaries, U.S. beneficiaries, and grantors, addressing compliance obligations and tax consequences. Thomas frequently speaks on international tax legislation and tax strategies relating to foreign trusts, outbound planning, and global intangible low-taxed income (GILTI) inclusions, among other international income tax and estate planning topics.



Carolina Goette

Counsel, Walder Wyss, Switzerland

Carolina Goette is a Counsel in both Private Clients and Tax teams. She regularly counsels high net worth families on domestic and international estate and tax planning issues and acts in complex cross-border matters, including estate administration, family wealth, preservation, and as an expert TEP (trust and estate practitioner), trusts. Carolina also lectures on topics related to her practice and is a member of various associations, such as The Career Women's Forum (CWF), The Women of IFA Network (WIN), the Forum for lawyers specialised in Inheritance Law of the Geneva Bar Association, the Society of Trust and Estate Practitioners (STEP). Carolina L. B. Goette graduated from the University of Geneva and was admitted to the Bar in 1996. Prior to joining Walder Wyss, she worked in Geneva and in the United States at major Law Firms and at the Geneva Court of Justice.
Alongside private practice, she serves as an Associate Judge at the Geneva Administrative Court of First Instance. Carolina L. B. Goette is registered with the Geneva Bar and is permitted to practice in all Switzerland. Carolina L. B. Goette is trilingual, she speaks English, French and Spanish.



Claire Gordon

Partner, Farrer & Co., UK

Claire Gordon is a Partner at Farrer & Co. With nearly 30 years of specialist family law experience and practice, Claire advises upon all areas of family breakdown. She is well known for resolving difficult personal situations for her clients, and avoiding lengthy legal battles with the inevitable emotional and financial cost. Her clients value her calm and reassuring confidence and her ability to achieve civilised outcomes wherever possible. Discretion for her clients is always absolutely key. She regularly acts for entrepreneurs, professionals, private equity individuals, the international elite and those with substantial generational wealth in helping to resolve their family disputes. Her cases often involve inherited wealth, trusts and family businesses and she takes a holistic approach, including working closely with clients' tax and international advisers. Claire has vast international experience, with a high proportion of Claire's cases requiring collaboration with jurisdictions across the world to protect her clients' interests. Claire has also developed a particularly notable reputation for her work on high value internationally complex nuptial agreements and the related structuring.



Patricia Guerra

Partner, MLL Legal, Switzerland

Patricia Guerra is a Partner and the Co-Head of the Private Client Practice Group of MLL Legal and Head of the Latin-America desk of the firm. She is the trusted advisor of UHNW and HNW individuals and their families on a broad range of personal matters and matters concerning relocation and family assets, including estate planning, nuptial agreements, family governance and philanthropy. Patricia Guerra continuously deals with complex cross-border issues and regularly takes on the legal leadership necessary to coordinate teams across various jurisdictions. She works in English, Spanish, German and French. Patricia is board member of several Swiss charitable foundations and of a Swiss Private Bank. She is furthermore the Honorary Consul of Ecuador in Zürich.



Dakis Hagen KC

Barrister, Serle Court, UK

Dakis Hagen KC is a Barrister at Serle Court. He specialises in Chancery litigation, both commercial and traditional. His cases usually involve international structures, most often trusts and estates, allegations of fraud or professional negligence and asset tracing. The international nature of Dakis' practice has meant that he is instructed both by London solicitors and also directly from overseas (including from the USA, the Caribbean, Hong Kong, Bermuda, Luxembourg, Switzerland, Gibraltar and the Channel Islands). He has appeared as leading counsel in courts in the Cayman Islands, BVI, Bermuda and Gibraltar as well as frequently in London. He is co-chairman of the Legal Week Trusts & Estates Litigation Forum.



Mark Harper

Partner, Hughes Fowler Carruthers, UK

Mark Harper is a Partner at Hughes Fowler Carruthers. Mark focuses on divorce and family law, in particular international cases and those involving trusts. He also deals with pre-nuptial and pre-civil partnership agreements. Mark also acts in international children's cases, including relocation cases. His Court of Appeal case of K v K helped to shape the law on relocation. In S v S, Mark achieved relocation but also change of primary carer for the children. Mark has been ranked one of the top ten UK family lawyers in Spear's Wealth Managements' Family law index for many years and is described as "without doubt the best technician in London". Mark is the co-author of International Trust and Divorce Litigation (Third Edition), Sir James Munby, President of the Family Division, in a review of that book said "This is a book which needs to be in the bookcase and in the briefcase of everyone involved on a divorce case with a trust element". Mark was the European Chapter President of the International Academy of Family Lawyers between 2014 and 2016. Mark has a keen interest in architecture, foreign travel and classic cars.



florence Hediger

Partner, MLL Legal, Switzerland

Florence Hediger is a Partner at MLL Legal. She is an attorney-at-law and certified tax expert with extensive experience advising Swiss and international private clients on tax and inheritance law matters. Her practice focuses on succession planning for entrepreneurial families, international wealth structuring, often involving trusts, estate planning, art and relocations. She also advises on cross-border employment and social security matters, as well as the legal and tax issues faced by charitable institutions. In addition, she regularly represents clients in complex proceedings before tax authorities and in tax litigation. Florence has almost a decade of experience at a top-tier Swiss full-service law firm, with professional experience in Zurich and Geneva, as well as a secondment to a leading private wealth law firm in London. With a multicultural background and international experience, Florence is particularly well positioned to advise clients with global interests. Her additional training in mediation and conflict management provides a strong foundation for navigating complex and conflict-prone situations.



Helen Hendy

Executive Director - Private Wealth, Praxis, Jersey

Helen Hendy is an Executive Director - Private Wealth at Praxis. Helen is a senior private wealth professional with more than 30 years' experience advising internationally mobile individuals and families on complex wealth structuring, succession planning and family governance. Based in Jersey, she has held executive board-level positions across independent, bank-owned and private equity-backed fiduciary businesses, bringing a broad perspective on the international private wealth industry and the evolving needs of sophisticated private clients. Helen has particular expertise in navigating complex cross-border considerations, including the changing UK tax landscape, and works closely with leading legal, tax and financial advisers to develop tailored strategies for asset protection, wealth preservation, estate planning and philanthropy. Having advised families across multiple generations, she is recognised for her considered, relationship-led approach and her ability to balance technical complexity with long-term family objectives. Helen joined Praxis in 2025. She is an associate member of ICSA and holds the Institute of Directors Diploma in Company Direction.



Rebecca Hick

Partner, Camilla Baldwin, UK

Rebecca Hick is a Partner at Camilla Baldwin, where she advises high net worth and ultra high net worth individuals on the full spectrum of family law, including complex financial remedies, pre and post nuptial agreements, and sensitive matters concerning children. Rebecca was educated at Queen Margaret's School, York and graduated with a Law degree from the University of Bristol. She qualified as a solicitor in 2020 and joined Camilla Baldwin in 2023. She was recently promoted to Partner on 1 November 2026. Outside her legal practice, Rebecca mentors university students in the developing world through the Madrinha Trust, supporting and encouraging the next generation of leaders.



Jonathan Hilliard KC

Barrister, Wilberforce Chambers, UK

Jonathan Hilliard KC is a Barrister at Wilberforce Chambers. Jonathan has a broad international trusts practice, with a particular love of solving complex problems and litigating over complex trust structures in all contexts. Over recent years, a significant proportion of his work has concerned attacking and defending complex offshore structures, and advisory work relating to this. Most recently, he appeared successfully on appeal before the Hong Kong Court of Final Appeal in the first case on Quistclose trusts before that Court, China Life Trustees Ltd (judgment 14 June 2024). Jonathan was shortlisted for ‘Chancery Silk of the Year’ at the Chambers & Partners 2021 UK Bar Awards and at the Legal 500 2023 UK Bar awards. He is consistently ranked in the directories for trusts, trusts and divorce, offshore and fraud work, Chambers 2025 describing him as “an extraordinary force” who “possesses unique qualities that are unrivalled”; “[h]e sees angles that others don’t see and is always five steps ahead”.



Paul Hodgson

Non-Executive Chairman, Praxis, Guernsey

Paul Hodgson is a Non-Executive Chairman on the Board of Praxis Group and brings over 35 years of expertise in fiduciary services, financial governance and administration to his role. He spent a distinguished 25-year tenure with the Butterfield Group, where he held pivotal leadership roles, including 17 years as Managing Director of the Bank's Guernsey trust company, and four years as Deputy Group Head of Trust, before retiring in 2023. Paul's career also includes a decade of international experience with KPMG, working across Australia, London and Hong Kong. A Fellow of Chartered Accountants Australia and New Zealand, he is also a member of the Society of Trust and Estate Practitioners (STEP) and was formerly a Fellow of the Chartered Institute for Securities and Investment, reflecting his deep commitment to professional excellence and industry standards. Beyond his professional roles, Paul has been a steadfast advocate for Guernsey's finance sector. He has held key leadership positions with the Guernsey Association of Trustees, the Guernsey International Business Association, and the local branch of STEP, championing the island's reputation as a leading financial jurisdiction.



Balz Hösly

Partner, MME Legal, Switzerland

Balz Hösly, Partner at MME Legal, Certified Specialist SBA Inheritance Law, TEP and Mediator SBA, is an expert for international inheritance law, family businesses and succession. He is the chairman of the board of two companies and, as an experienced mediator, also focuses on conflict resolution. In 2004, after a distinguished career in the industry (insurance, marketing and international consulting), Balz joined MME Legal Ltd., a professional services firm in Zurich and Zug with more than 100 professionals, as a partner and set up the firm's Private Clients' team for individuals and families. As leader of the team, he advises his clients in all economic matters,their interentional estate planning and family wealth. The Swiss Federal Office of Justice appointed him as a member of the expert committee for the revision of Switzerland's Inheritance Law.



Josephine Howe

Partner, Ogier, Jersey

Josephine Howe is a Partner in Ogier Jersey's private wealth team. Josephine advises professional trustees, high net worth families and family offices on all issues concerning family wealth structures; including advising on the establishment, ongoing administration and restructuring of complex trust structures, foundations, family offices and private trust companies, together with related fiduciary duties, philanthropy, regulatory and corporate law issues. Josephine is also a BVI qualified lawyer.



Flora Hussey

Partner, Payne Hicks Beach, UK

Flora Hussey is a Partner in the private client department of Payne Hicks Beach, specialising in UK tax, wealth management and succession planning for high net worth individuals, families and family offices.She advises entrepreneurs, families and multi-generational family businesses on complex domestic and cross-border matters, with experience in establishing trusts, companies and other vehicles for effective succession planning, tax efficiency and long-term asset protection. Flora has a significant practice in the family office sector, frequently assisting with the establishment, governance and ongoing operation of family offices and private wealth structures. Her work spans estate planning, residence and domicile matters, charitable giving and the coordination of international advisory teams. She is a member of STEP, is recognised as a top practitioner by Spears and is listed in the Tatler directory.



Ingrid Iselin

Partner, Kellerhals Carrard, Switzerland

Ingrid Iselin is a Partner and Co-Chair of the Private Clients team of Kellerhals Carrard. She represents her clients, both Swiss and foreign, in often complex and cross-border inheritance disputes both in negotiations and before the Swiss courts and authorities. Ingrid also advises her clients on their estate planning, entrepreneurs on the transfer of their businesses and the various parties involved in an estate (executor, banks, family offices, etc.) on the administration and liquidation of complex estates. Ingrid holds the title of Swiss Bar Association (SBA) Specialist in inheritance law. She has been appointed by the Swiss Federal Office of Justice as an expert in the Federal Expert Group for the reform of inheritance law currently ongoing in Switzerland. Ingrid is also a member of the Society of Trust and Estate Practitioners (STEP).



Nicholas Jacob

Partner, Forsters, UK

Nick Jacob is a Partner in the Private Client team at Forsters. With over 40 years' experience, Nick is a world renowned specialist in family governance and succession planning. Working with multi-generational business families, Nick makes it a priority to understand the psychology of the family, in order to uncover the issues and deal with these head on. Only then can Nick put in place the necessary legal structures to ensure the successful transition of wealth from one generation to the next. Ranked in the latest Legal 500's Hall of Fame and Band 1 in Chambers HNW Guide, Nick is recognised as 'a leader in his field' for his 'sophisticated private wealth planning advice', and a first class lawyer. With 'a phenomenal reputation in Asia', (Chambers 2024), Nick has a particular focus on advising families in East Asia and understands the evolving cultural dynamics facing different generations in this region. This is demonstrated by Nick's recognition as a foreign expert in Singapore in the latest Chambers HNW Guide; one of only three individuals named for this expertise. He has also been cast as "The Godfather of Asian Family Governance". He also specialises in UK taxation for individuals and trusts, cross-border taxation coordination, and advises banks and trust companies on technical issues. Nick is a STEP Emeritus Member and was named 'Trusted Advisor of the Year' at the STEP Private Client Awards 2024. He is also Who's Who Global Private Client Practitioner of the Year 2023.



Alex Jones

Partner, Rawlinson & Hunter, UK

Alex Jones is a Partner at Rawlinson & Hunter, he is a dual UK and US tax private client advisor, leading the UK/US Private Client practice. He is known for providing advice and compliance services on complex cross border issues facing high net worth individuals. Alex assists fund management professionals, business owners, entrepreneurs and sports and entertainment clients. He advises on the UK and US interactions of income, capital, social security, Estate & Gift/Inheritance taxes, and the use of trusts. He is particularly noted on the application of the UK/US income and Estate and Gift Tax treaties, pension issues and the UK treatment of US LLCs.



Jennifer Jordan McCall

Partner, Pillsbury Winthrop Shaw Pittman, USA

Jennifer Jordan McCall, Partner and Co-Leader of the Litigation – Trusts, Estates and High Net Worth team at Pillsbury Law, is an award-winning legal authority on U.S. and international gift and estate planning. Jenny crafts tax-savings business succession and estate transfer plans that preserve wealth and enhance family relationships and represents clients in dispute resolution and litigation involving family disputes and trusts and estates matters. She is based in the Silicon Valley, New York and Palm Beach offices and is admitted to practice law in CA, FL, WY and NY.



Natasha Kapp

Partner, Carey Olsen, Guernsey

Natasha Kapp is a Partner in the trusts and private wealth team at Carey Olsen in Guernsey. She deals with all aspects of contentious and non-contentious trust matters and advises professional trustees, family offices and UHNW families and individuals on the establishment, administration and restructuring of complex trusts and foundations and underlying structures. She continues to advise some of the largest family offices and philanthropies established in Guernsey and regularly appears before the Royal Court of Guernsey in trust administration proceedings. She is ranked as a leading partner for Private Client, Trusts and Tax, in Guernsey in the Legal 500 UK and in the Chambers UK, Global and HNW Guides.



Gilly Kennedy-Smith

Partner, Mourant Ozannes, Guernsey

Gilly Kennedy-Smith is a Partner at Mourant, a Guernsey Advocate and an English solicitor. She heads the award winning International Trusts and Private Client team in Guernsey. Gilly has two decades of experience in London and offshore. She advises international high net worth families and family offices, as well as Guernsey and Swiss trust companies on the establishment, restructuring and management of family asset holding vehicles, and on estate and succession planning. Her clients are global, with a particular focus on Middle Eastern, Swiss and UK connected clients, and she regularly works with advisers in other jurisdictions to build succession solutions that work across generations. Gilly regularly works with local trustees, advising them on their fiduciary responsibilities and the good governance of their structures, and advises on the set up and running of philanthropic structures. She works closely with her dispute resolution colleagues and the corporate team. Gilly is a full member of STEP and sits on the Guernsey branch committee. She qualified as a Tax Technician in 2018 (no longer practising). She is a regular speaker in Guernsey and beyond and has published a number of articles. In 2024, she was appointed International Correspondent for Private Client Business.



Elizabeth Kubanik

Partner, Sullivan & Cromwell, UK

Elizabeth Kubanik is a Partner and 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. Elizabeth is a member of The International Academy of Estate and Trust Law. Elizabeth is the co-contributing editor of Chambers Global Practice Guides: Private Wealth, a co-author of the chapter on United States law in The Private Wealth and Client Review, Second to Twelfth Editions, and a co-author of the article entitled "Planning for Changes of Domicile, Residence, Citizenship and Nationality: The United States Perspective" published in the September 2012 edition of Trusts & Trustees. She is recognized in Chambers High Net Worth 2023. Clients have praised her as "immersed in the firm's international practice and is a reliable point of contact. She is straightforward and user-friendly, a real joy to work with." Elizabeth's clients have described her as "brilliant, very likeable and good with clients" and "encyclopedic. She's absolutely first-class and helpful, easy to work with and very clear." She was also named in the Private Client Global Elite 2023 by Legal Week as a top lawyer in the field.



Phil Lenz

Managing Director, Butterfield Trust, Switzerland

Phil Lenz is Managing Director of Butterfield Trust, Switzerland, with more than 20 years of experience in corporate banking, wealth management and international wealth structuring. Having joined Butterfield in 2007 as Deputy Country Head, he was appointed Managing Director in 2023 and has played a key role in the growth of the Swiss trust business. Prior to Butterfield, Phil served as Chief Administration Officer for Barclays' global wealth structuring division, where he was involved in strategic planning, acquisitions and the administration of complex trust structures for international clients. He is a member of the Society of Trust and Estate Practitioners (STEP) and holds a BSc in Mathematics from Imperial College London.



Daniel Leu

Partner, Bär & Karrer, Switzerland

Daniel Leu is at Partner at Bär & Karrer AG. Daniel advises private clients and family offices on wealth and succession planning, on the handling of estates, in connection with foundations and trusts and on questions in connection with the place of residence. Other areas of work include advising clients who buy or sell real estate in Switzerland and art law. Daniel Leu is a Certified Specialist SBA Inheritance Law and publishes regularly in the field of inheritance law. He has published extensively and frequently lectures on trust and estate matters in Switzerland and abroad. In addition to his practice, Daniel Leu is a lecturer at the University of Muenster, Germany (Master of Law in Inheritance Law & Corporate Succession). Daniel Leu is recommended by Chambers and Partners, Who is Who Legal, Legal 500 as well as by the Legal Week Private Client Global Elite Directory.



Charlie Lilwall

Director, Strategic Accounts, TransPerfect Legal, UK

Charlie Lilwall is a Director at TransPerfect Legal in London, working with leading law firms, family offices and private client practices across the UK and offshore jurisdictions. He specialises in supporting contentious trust and private client lawyers with complex disputes, investigations and cross-border matters, helping them manage large volumes of evidence, meet tight deadlines and control costs. Charlie works across eDisclosure, managed review, multilingual review and Generative AI (GenAI) solutions, developing bespoke, technology-driven workflows to improve efficiency, reduce costs and deliver better outcomes for clients.



Meir Linzen

Chairman, Herzog Fox & Neeman, Israel

Meir Linzen is Chairman of Herzog Fox & Neeman and leads its Tax, Private Client, and Gaming & Gambling Departments. With over 40 years of experience, including 20 years managing Herzog, he is recognized as one of Israel’s foremost tax experts. Meir specializes in tax planning for cross-border transactions and has extensive expertise in the tax aspects of international mergers and acquisitions. As Head of the Tax Department, he has advised on significant tax issues involving multinational corporations, including local acquisitions, transfer pricing, and investor and employee benefits in some of Israel's largest transactions. Meir also has unmatched experience advising banks, multinational corporations, and private clients in cross-border activities, encompassing international tax and estate planning. His expertise extends to E-Commerce law, making him a key figure in this field. With a background in international law, Meir is also a leading expert in Public International Law and Defence and Homeland Security. He is renowned for providing strategic legal counsel to both public and private entities operating in complex regulatory environments.



Charles Lloyd

Partner, Harbottle & Lewis, UK

Charles Lloyd is a Partner at Harbottle & Lewis. He is a private client disputes lawyer with over 25 years of specialist experience in a broad range of international trust and estate disputes as well as general commercial litigation. He has a depth of experience and specialist expertise in advising trustees, beneficiaries, protectors, executors, administrators in contentious situations arising out of disputes involving these structures. In particular, he advises on disputes relating to the succession of valuable family businesses and other assets held in complex structures, involving trusts, foundations, partnerships and other corporate entities, as well as cross-border estates. These cases have often involved issues around the capacity of settlors and testators.



William Longrigg

Partner, Charles Russell Speechlys, UK

William Longrigg is a Partner and the former Head of the Charles Russell Speechlys Family Group and has been among the best known and highly ranked family lawyers in London. He specialises in international Family Law matters. He has won several awards over the years, is ranked tier 1 in Chambers, the ‘Hall of Fame’ in Legal 500 and is listed as a ‘Top Recommended’ Family Lawyer in the Spear’s 500 2023. He is the joint author of Family Breakdown and Trusts for Butterworths and is a past president of the International Academy of Family Lawyers (IAFL).



Paolo Ludovici

Partner, Ludovici Piccone & Partners, Italy

Paolo Ludovici has been a Partner of GPBL since 2021 following the merger with L&P – Ludovici Piccone & Partners, a firm he founded in 2014. Previously, he worked for twenty-three years at Maisto e Associati since its establishment, becoming a partner in 2000. He advises on all areas of tax law. His expertise includes domestic and international corporate reorganizations, M&A and structured finance transactions, tax planning for high net-worth individuals and trusts. He often acts as an expert in criminal and tax proceedings. Since 2021, he has been awarded "Tax Star Status" by Chambers & Partners Europe on the back of overwhelming praise from clients. He is recognized "Leading Individual" by Legal500 EMEA and recommended "Band 1" in Chambers HNW Guide, furthermore he has been identified among the leading experts by Who's Who Legal in Private Client and Corporate Tax practice. He has been awarded "Professional of the Year" at Legalcommunity Tax Awards 2022, 2020 and 2019 and he awarded the prize "Professional of the Year" for Tax Consultancy at Top Legal Awards 2021.



Craig MacIntyre

Director, Co-Head of Private Client and Trust, Conyers, Bermuda

Craig MacIntyre is a Director and Co-Head of the Bermuda Private Client & Trust practice. Craig joined Conyers in 1997. Craig's practice is reflective of his clientele – challenging, vibrant and diverse. His business encompasses a broad spectrum of trust, company, estate planning and asset protection opportunities. Craig is a subject matter expert often sought after as a guest speaker and panelist for his straight-forward, practical knowledge while lauded by industry peers and clients for his unwavering loyalty and actions in their best interests. He adeptly draws upon Conyers' deep bench strength to collaborate within the private client department and across the firm for fast, technical expertise exceeding clients' expectations with solution oriented answers. He values clients' time just as much as he values his – and is thus well suited to efficient and effective minded clients.



Henry Mander

Global Head of Trusts & Private Wealth, Harneys, UK

Henry Mander is the Global Head of Private Wealth at Harneys. He is admitted in Cayman, BVI and Bermuda and relocated to London in Autumn 2024 after 14 years in the Caribbean. Henry has over 20 years experience (onshore and offshore) in complex estate planning solutions for international ultra high net worth families. He has particular expertise in the effective use of trusts to own family businesses, with appropriate allocation of responsibilities between stakeholders. In recent years he has also advised a number of family offices in relation to governance evaluation projects for family offices where the main operating business was in the process of being sold.



Justine Markovitz

Senior Partner, Withers, Switzerland

Justine Markovitz is a Senior Partner in the private client and tax team. She is also head of the Swiss Practice and leads the firm's Community, Planet and Impact initiatives. Justine joined Withers in 1999, becoming Partner in 2004. She founded Withers' Swiss Practice in Geneva in 2005 and has led it since that date. She co-headed the firm's Global Private Client and Tax team from 2016-19, when she was voted into the position of Chairperson. She has a very successful practice as a leading tax, trusts and estates adviser, working with international families on their succession planning and the structuring of their personal assets and business interests. Justine's day-to-day work focuses on advising global families, their family offices and their trustees on generational transition and family governance. She works with families on international tax and estate planning matters to implement their long-term succession plans.



Piers Master

Partner, Charles Russell Speechlys, UK

Piers Master, Partner at Charles Russell Speechlys, acts for high net worth individuals from across the world, but especially from the Middle East, where he acts for many ruling family members and billionaires – many of whose families have US links. His work for these families includes advising on the establishment of global assets holding structures, family governance projects and global real estate investments. Piers is a Visiting Professor at the University of Law, a Council Member of the International Academy of Estate and Trust Law, and an International Fellow of the American College of Trust and Estate Counsel. He lectures regularly in the UK and internationally on matters of private client interest.



Clare Maurice

Founding Partner, Maurice Turnor Gardner, UK

Clare Maurice is a Founding Partner of Maurice Turnor Gardner, and is recognised as one of the leading figures within the private wealth industry. As one of the world's foremost private client solicitors, Clare Maurice has an unrivalled profile. Identified as a top-ranked solicitor by Chambers & Partners, the Legal 500, Spear's, Best Lawyers, Who's Who Legal and the Private Client Global Elite to name but a few, Clare's clients benefit from her wealth of experience in advising individuals and families on the tax and structural challenges of global wealth. In addition to advising UHNW individuals and families, Clare also advises both resident and non-UK resident trustees on legal and practical issues which are relevant to them and their beneficiaries. She also has a wealth of experience advising on philanthropy matters and, in particular, how to establish and operate charities. Her practice has a distinctly international focus and she advises clients from all over the world (and, in particular, the Americas, the Middle East and Europe) on all aspects of pre-arrival planning, residence/domicile issues and the establishment of asset holding structures.



Gail McCourt

Head of RBC International Trusts, RBC Trust Company, Jersey

Gail McCourt is Head of RBC International Trusts for RBC Wealth Management's trust business. Based in Jersey, Gail is responsible for the award-winning Fiduciary Management and Technical Trust team, providing solutions to help clients preserve their wealth and create a meaningful legacy. She is a member of the RBC Wealth Management Europe Executive Committee, Chair of the RBC International Trusts Management Committee, and sits on a number of boards.Gail joined RBC in 2003 and has held roles including Head of Marketing, Head of Client Experience and Head of Fiduciary Management. She was recognised as one of eprivateclient's 50 Most Influential in 2023. She is also an active advocate of diversity and inclusion, and in 2018 was recognised by mental health charity Mind, winning its Senior Leader Award in celebration of her commitment to driving a healthy, inclusive and respectful workplace culture.Gail holds the Institute of Directors Diploma in Company Direction, the ICA International Diploma in Anti-Money Laundering, and the Investment Management Certificate from the Chartered Institute for Securities & Investment. She also holds a BA (Hons) and Masters in Applied Languages for Business.Outside of work, Gail enjoys spending time with her husband and two daughters.



Andrew Mold KC

Barrister, Wilberforce Chambers, UK

Andrew Mold KC is a Barrister at Wilberforce Chambers specialising in all types of trusts and estates litigation, fraud and breach of fiduciary duties and related professional liability claims. He also has extensive experience of 'big money' divorce cases involving the treatment of trust assets. He regularly appears in the English Courts as well as in offshore jurisdictions. The latest Chambers directory says: 'Andrew is brilliant', 'an excellent and unflappable advocate', 'if you have a big trusts dispute he's the guy you want' and 'Andrew is the full package. He is highly intelligent, an excellent advocate and someone who is brilliant with clients'.



Bertold Mueller

Managing Director, EMEA, Christie's, Switzerland

Bertold Mueller is a Managing Director, EMEA at Christie's. Bertold joined Christie's in 2012. He was appointed Christie's Managing Director for Europe, Middle East and Africa in 2017. Prior to joining Christie's, Bertold worked as an attorney at law in Zurich and London. Bertold's focus as a lawyer was on art and inheritance law. He holds a PhD in Law (University of Zurich), a Master of Laws (LLM; Harvard Law School), a Certificate in Advanced Studies from the University of Zurich (in inheritance law) and a Master's in Fine and Decorative Art (University of Manchester). Bertold is a delegate of UNICEF Switzerland and Liechtenstein and the vice president of its finance commission. He has been lecturing in the University of Zurich's executive master program of art market studies for over 10 years and is a passionate charity auctioneer.



Michael Neff

Group Chief Operating Officer, Butterfield Trust, Bermuda

Michael Neff is Butterfield's Group Chief Operating Officer, a position he has held since January 2024. Prior to that role, he served as Managing Director of Bermuda and International Wealth from 2018 having previously served as the Bank's Group Head of Wealth Management. Michael has over 30 years of experience in financial services, having held senior roles in wealth management, commercial banking, and financial risk management. He began his career at Chemical Bank's Private Banking Group, rising to serve on the Group's Executive Committee and leading relationship management across the group. Later, Michael moved to Citibank's Private Banking Group, where he led the design and implementation of a global client relationship framework before leaving to found a financial and investment planning technology consultancy. The firm grew to be a leading provider of financial and investment planning software for financial institutions in the U.S. and Europe. It was acquired in 2004 by the RiskMetrics Group, a JPMorgan risk advisory spinoff. There he initially served as Global Head of Wealth Management rising to become Co-Head of the firm's Global Financial Risk Management business. Michael holds a Bachelor of Arts from Middlebury College and a Master of Business Administration from Columbia Business School.



Xavier Nicholas

Partner, Head of Private Client, Forsters, UK

Xavier Nicholas is a Partner and Head of Private Client at Forsters. Recognised as one of eprivateclient's "50 Most Influential" private client professionals and one of Legal Week's Private Client Global Elite, Xavier leads Forsters' award-winning private client practice. As the Head of Private Client, Xavier advises individuals, families and trustees in the UK and overseas on personal taxation, trust and estate planning. Xavier has specialist expertise in the establishment, taxation and operation of cross-border asset holding structures – including companies, partnerships, trusts, private trust companies and foundations. Technically gifted and commercially astute, he is a trusted advisor to international wealthy families. He has particular experience in advising families and trustees with business interests – including on the creation of family charters and constitutions, and other aspects of family governance. For overseas clients, Xavier advises on pre-arrival tax planning for individuals seeking UK residency, and succession planning for those with assets in more than one jurisdiction.



Matthias Niedermüller

Founder and Managing Partner, Niedermüller Attorneys at Law, Vaduz, Principality of Liechtenstein

Matthias Niedermüller, Founder and Managing Partner of Niedermüller Attorneys at Law (established in 2017) has been practicing in Liechtenstein as an Attorney since 2006. Further he is admitted in Switzerland and Austria. His firm is a Liechtenstein-based boutique law firm specialized in dispute resolution matters as well as advice of UHNWI and HNWI individuals regarding Foundation and Trust law matters. The firm is top tier in Fintech matters and highly regarded in Banking and Finance matters. Matthias has extensive experience in advising private clients, contentious and non-contentious litigation and arbitration proceedings, Asset Recovery, White Collar Crime, M&A, Banking and Finance and Fintech matters. His clients particularly appreciate the creative and solution oriented approach of the firm and the hands on mentality. He is also a Liechtenstein Public Notary, member of STEP and holds a PhD from the University of Innsbruck (Austria) as well as a Master of Business Law (M.B.L.-HSG) at the renowned University of St. Gallen. Further, he regularly speaks at international legal and private client conferences and publishes in widely regarded legal journals.



Luca Nievo

Director, MIDAS Wealth Management, Luxembourg

Luca Nievo is a Director at MIDAS Wealth Management, which he joined in 2024. He has more than 20 years of private banking experience, gained at Quintet, Degroof Petercam, UBS and ING Private Banking. He advises high-net-worth families in Belgium, France and Italy on discretionary and advisory portfolio management, multi-asset investment and wealth-planning solutions, including credit facilities. Luca is also Vice President of the Fondazione Ippolito e Stanislao Nievo, a foundation dedicated to literature. He holds a Master's in Economics from Università Carlo Cattaneo (LIUC) and is fluent in Italian, French and English.



Alain Nijs

Partner, NijsDraye, Belgium

Alain Nijs is a Partner at NijsDraye, an independent private client boutique firm based in Antwerp, Belgium. Alain advises his clients on legal, tax and other issues, often cross-border, regarding their family, their wealth, and their business. Dedication, big picture awareness and long-term approach are key for Alain. Alain has specific expertise in complex cross-border tax and estate planning, among others, related to migration from and into Belgium, and in designing and structuring family offices and family (business) governance rules.



francesca Nizzoli

Associate, Chiomenti, Italy

Francesca Nizzoli is an Associate at Chiomenti and advises and represents Italian and international clients across a broad spectrum of tax matters, with a particular focus on wealth management, international taxation, trusts and estate planning. Her practice is centred on supporting HNWIs, families and family offices in the design and implementation of cross-border tax and wealth-planning structures, with a strong understanding of global mobility dynamics. She also advises on the Italian tax implications of international wealth-holding structures and succession planning.



Margaret O'Sullivan

Managing Partner, O'Sullivan Estate Lawyers, Canada

Margaret O'Sullivan is Managing Partner of O'Sullivan Estate Lawyers. Margaret's practice involves all aspects of trust and estate work for domestic and international private clients, including estate planning; will and trust planning; incapacity planning; estate litigation; advising executors, trustees and beneficiaries and administration of estates and trusts, with a focus on high net worth domestic, cross-border and multijurisdictional succession issues. Margaret is recognized in The Best Lawyers in Canada 2025, Legal Week's Private Client Global Elite 2025 representing the top 250 private client lawyers worldwide, in the 2025 Edition of The Canadian Legal Lexpert Directory as one of the most frequently recommended estate planning lawyers, and as a thought leader in The Who's Who Legal: Private Client 2025 and in The Who's Who Legal: Canada 2025. She is one of the top-ranked Band 1 private wealth client lawyers in Canada in Chambers High Net Worth 2025 Guide. Margaret has been ranked Band 1 by Chambers and Partners since 2019.



Raul-Angelo Papotti

Partner, Chiomenti, Italy

Raul-Angelo Papotti, Partner and Head of Chiomenti Tax practice and of Advisory department, advises on all areas of tax law, with particular emphasis on international tax law. He has a special expertise in the taxation of trusts and tax planning structures, and in estate planning, advising corporate and private clients alike. Clients include investment banks, private banks, corporates as well as high net worth individuals, families and family offices. He is author of many publications on international tax and estate planning matters and is frequent speaker at the most prestigious domestic and international congresses. Raul-Angelo is ranked as a leading expert in the foremost international legal guides such as Chambers, Legal 500 and Who's Who Legal.



Marni Pernica

Partner, Aird & Berlis, Canada

Marni Pernica is a Partner and Co-Practice Group Leader of Aird & Berlis' Tax and Estates & Trusts Groups, and a member of the Estates & Succession Planning Group. Her practice focuses on estate, income tax and succession planning, including cross-border planning, planning to reduce estate administration tax (known as probate fees), the preparation of wills, powers of attorney and trusts, and assisting with estate administration. Marni advises on how to reduce personal and corporate tax, including the effective use of a family trust. She offers thoughtful and effective planning for clients ranging from young families who are just starting out to multi-generational families who are looking for ways to transition assets to the next generation. Marni navigates the complexities that arise in complicated and layered family structures, such as the dynamics that are present in blended families. She also has experience with cross-border planning for clients who have U.S. or other foreign connections.



Andrew Perree

Director, Head of Special Projects, RBC Wealth Management, Jersey

Andrew Perree is a Director for RBC Wealth Management's fiduciary business in the British Isles. Based in Jersey, Andrew manages a team of professionals who are responsible for the management of strategic projects within the trust company. Andrew spent several years leading the RBC Wealth Management's fiduciary business in the Caribbean until its sale in May 2017. Since returning to Jersey, Andrew led a fiduciary team in Jersey, before moving to his current role. Born and educated in Jersey, Andrew started his career in private client wealth management in 1984. He joined Abacus Financial Services Group in 1994, where he had responsibility for a portfolio of international clients, many of whom had substantial personal and business interests in the UK. He joined RBC in 2005 following the company's acquisition of Abacus. Andrew is a member of the Society of Trust and Estate Practitioners. In his spare time, he enjoys cycling as well as unwinding with his wife and son on the waters of the Channel Islands.



Anthony Poulton

Partner, Baker McKenzie, UK

Anthony Poulton is a Partner and the Head of the Dispute Resolution Department at Baker McKenzie in London and also leads the firm's highly regarded Trust Disputes Team. Anthony is a litigator (qualified in England and Wales) who has spent his career advising clients affected by succession disputes, fraud and all types of private wealth related controversy. He acts for trustees, beneficiaries, private banks and third party creditors and has played a significant role in some of the largest international cases of recent times. His cases include the leading "trust-busting" authority (Re Esteem / Grupo Torras v Al Sabah), the ongoing $20bn+ Wong v Grandview case and numerous high profile, high value matters which have been litigated in England, Bermuda, Bahamas, Jersey, Guernsey, Gibraltar, BVI, Cayman, Hong Kong and the Isle of Man. He is a regular speaker at conferences in England and across the offshore world. His many enthusiasms include friends and wine, ideally at the same time.



Omar Puertas-Álvarez

Legal Innovation Partner, Harvey AI, Spain

Omar Puertas is a Legal Innovation Partner at Harvey, where he advises law firms and in-house legal teams on AI strategy, adoption, and measurable impact. He spent 25 years at Cuatrecasas, most recently as an equity partner in the dispute resolution practice, leading complex international arbitration and commercial litigation across Europe and Latin America. He was based in Shanghai for 13 years, where he set up the firm's Shanghai and Beijing offices, and earlier practised international arbitration at Skadden, Arps in New York. Omar teaches AI to executives at MIT and Wharton Business School, in addition to law schools such as ESADE, UPF, Geneva, Rome and others.



Philippe Pulfer

Partner, Walder Wyss, Switzerland

Philippe Pulfer is a Partner and Co-Head of the Private Client practice of Walder Wyss. He is widely recognised as one of Switzerland's leading private client lawyers and, for more than 20 years, has been constantly top ranked by all major professional directories. Philippe specialises in wealth structuring and estate planning with an international focus and acts in complex, mostly multi-jurisdictional, succession and trust disputes. Philippe is a member of the International Bar Association (IBA), Society of Trust and Estate Practitioners (STEP) and The International Academy of Estate and Trust Law (TIAETL), as well as an International Fellow of the American College of Estate and Trust Counsel (ACTEC). He is the author of the chapter International Estate Litigation in: "Estate Planning – The Swiss Perspective", published in 2024.



Beatrice Puoti

Partner, Stephenson Harwood, UK

Beatrice Puoti is a Partner at Stephenson Harwood and is recognised as one of the leading individuals in the private wealth sector. She is ranked by Chambers & Partners for Private Wealth, Family Offices & Funds Structuring and Foreign Expertise (Italy), and her top-ranked team was named Private Client Team of the Year at the 2023 British Legal Awards



Shawntel Randi

Partner, Rubin and Rudman, USA

Shawntel Randi is a Partner in the Rubin and Rudman's Trusts & Estates department, she advises high-net-worth individuals, multigenerational families, and fiduciaries, on sophisticated domestic and international estate planning, trust and estate administration, and cross-border tax matters. Drawn to private client law by the opportunity to build lasting relationships with families across generations, Shawntel enjoys helping clients solve the complex legal and tax challenges that arise when wealth, assets, and family members span multiple jurisdictions.



Keith Robinson

Partner, Carey Olsen, Bermuda

Keith Robinson is a Partner and Global Head of the Trusts and Private Wealth team of Carey Olsen. He has 30 years' experience in non-contentious and contentious trust and private wealth matters. He has particular expertise in high-value trust litigation and court approved trust restructurings, often with a multi-jurisdictional element. He has acted in a range of cases before the Supreme Court and Court of Appeal for Bermuda and has been involved in many major trust cases in Bermuda. He also advises on non-contentious Bermuda trust matters and acts as a Protector. He is recognised as a 'star individual' in Bermuda by Chambers HNW and as a leading individual by The Legal 500. He is an elected fellow of the American College of Trust and Estate Counsel, Treasurer of the International Academy of Estate and Trust Law and an active member of STEP. He is also President of the Bar Council of the Bermuda Bar Association.



Jay Rosenbaum

Partner, Nixon Peabody, USA

Jay Rosenbaum is a Partner at Nixon Peabody, and the leader of the firm’s International Private Clients Team. Jay represents high net worth individuals, families and family offices around the globe, providing expert, yet practical, US-focused private client experience to those who require management of tax and legal exposures in multiple jurisdictions. He also serves as an onshore US trustee for many international families. Jay’s early career was focused on middle market corporate transactions. He draws on that experience to develop planning techniques for client families who own businesses and require integrated personal and corporate planning strategies.



Joshua Rubenstein

Partner and Global Chair, Katten Muchin Rosenman, USA

Joshua Rubenstein is a Partner and Global Chair of the Private Wealth Department at Katten. In his widely respected practice, Joshua Rubenstein, National Chair of Katten's Private Wealth Practice, brings a variety of important services under one roof for high-net-worth individuals. He offers integrated planning, administration and litigation counseling for individuals, their estates and their businesses, all of it designed to preserve wealth over generations. His advice stretches as far as his clients' financial interests – locally, nationally and globally.



Heini Rüdisühli

Deputy Managing Partner, Lenz & Staehelin, Switzerland

Heini Rüdisühli is a Deputy Managing Partner at the Lenz & Staehelin Zurich office, where he leads the Private Clients practice group. His main field of activity is national and international tax planning for private individuals. Heini also specialises in inheritance law, succession planning and the executorship of estates, and has a broad knowledge of trusts.



Humberto Sanches

Managing Partner, Humberto Sanches e Associados, Brazil

Humberto de Haro Sanches is a Partner of Humberto Sanches e Associados, a private client boutique law firm based in São Paulo, Brazil. He has J.D. from PUC/SP and an MBA in Finance from Insper (São Paulo). He was a foreign associate at Cravath, Swaine; Moore in NY (2000-2001) and is frequently high ranked in international publications, such as Chambers High Net Worth, Latin Lawyer 250, Leaders League, Who & Who Legal, The Legal 500 e Private Client Global Elite. He is a member of the São Paulo Chapter of the Brazilian Bar Association (OAB/SP), STEP, the American College of Trusts and Estates Counsel (ACTEC), the International Academy of Estate and Trust Law and The International Family Offices Editorial Board.



Amelie Sarrado

Director, Head of Private Office, Christie's, UK

Amelie Sarrado serves as Director, Head of Private Office at Christie's, where she leads the firm's work on top global collections. She works hand in hand with family offices and professional advisors to advise UHNW collectors on building and strategically managing their art collection. Recent market shifts have meant an increased focus on art, both as an asset within a diversified portfolio and as a cornerstone of long-term legacy planning for established collection. In this evolving landscape, changes in collecting tastes and the need for agile navigation of complex family dynamics can have a defining impact on the longevity and integrity of a collection's legacy. Active, thoughtful management alongside trusted long-term relationships are essential to guiding collectors through this journey successfully. Amelie also sits on the Courtauld Advisory Board, where she contributes to a project focused on next-generation digital innovation. Previously, she served as Chief of Staff to Christie's CEO, Guillaume Cerutti, and led the Asian Art departments across Christie's Europe



Alexa Saunders

Partner, Carey Olsen, Jersey

Alexa Sauders is a Partner and Head of the Trusts and Private Wealth group at Carey Olsen in Jersey and has a broad non-contentious trust practice. Alexa regularly advises in connection with private family trusts, employee benefit trusts and pension trusts, including on the establishment of new trust structures, drafting trust and ancillary instruments and advising in connection with the ongoing administration and restructuring of complex trust structures. Alexa also advises in connection with philanthropic and charitable structures as well as foundations.



Clemens Philipp Schindler

Founding Partner, Schindler Attorneys, Austria

Clemens Philipp Schindler is a Founding Partner of Schindler Attorneys. Previously, he spent six years as a Partner at Wolf Theiss, leading major transactions and heading its Brazil operations. He also practised with Haarmann Hemmelrath in Munich and Vienna and Wachtell, Lipton, Rosen & Katz in New York. Clemens advises on corporate and tax matters, focusing on cross-border M&A, private equity, corporate reorganisations and international holding structures. His expertise also includes charter financing, leasing operations and private client work. He holds law degrees from the University of Vienna and NYU Law (LL.M.), as well as a business administration degree, and is admitted in Austria as both an attorney-at-law and certified public tax advisor. Clemens has authored over 50 publications and regularly speaks at conferences. He is ranked by Chambers, Legal 500, IFLR1000, Who's Who Legal and JUVE, with Chambers also recognising his Brazilian expertise.



Rosie Schumm

Partner, Forsters, UK

Rosie Schumm is a Partner in Forsters' Family team and is known for taking a creative and pragmatic approach to family law to achieve the best outcome for her clients. She specialises in advising high net worth clients on complex divorce and financial matters, including those relating to children. Her work frequently has an international dimension, involving trusts, offshore assets and family businesses. She is also highly experienced in preparing and negotiating pre and post nuptial agreements for high net worth families. Rosie is a regular commentator on developments in family law and has appeared in The Telegraph, Times, and The Guardian and written articles for the Law Society Gazette and Spears. She has presented seminars to wealth managers, city bankers, accountants, fiduciary services and mediators and has prepared presentations for family law and private client conferences in Italy, the Channel Islands and London. Rosie is a Leading Individual; in the Legal 500 2021 edition and is ranked in the Chambers UK and HNW guides for her work on a wide spectrum of family issues. In addition, she is recognised as a Top Recommended Lawyer in the Spears 500 2022 directory.



Rahul Sharma

Partner, Fasken, Canada

Rahul Sharma is a Partner at Fasken. He advises international and Canadian clients on a variety of tax, trust, and estate planning matters. He is particularly experienced with cross-border and international trust and estate matters, as well as matters involving offshore or non-resident trusts with ties to Canada. Rahul also counsels high and ultra-high net worth individuals, corporations, trusts and estates on Canadian income tax matters, including succession planning for closely held businesses. Rahul regularly advises both resident and non-Canadian trustees and trust companies on Canadian tax matters. Rahul is recognized by Chambers and Partners as a leading lawyer in the area of private wealth law in Canada, particularly for his work on cross-border/international matters. Rahul is also recognized by Best Lawyers as a leading lawyer for trust and estate matters in Canada. Fluent in English, French, Spanish, Hindi and Urdu, Rahul regularly speaks on private client and tax topics and has authored and co-authored various chapters, papers and articles on tax, trust and estate-related matters. Rahul is the Editor-in-Chief of Federated Press' Personal Tax and Estate Planning journal and a co-editor of Thomson Reuters' Taxes and Wealth Management publication.



Natalie Sherborn

Partner, Withers, UK

Natalie Sherborn is a Partner at Withers. Natalie advises successful people, their families and organisations on all aspects of financial crime and other serious conduct issues. Clients include high profile individuals in politics, business and the arts, professionals and entrepreneurs, families and family offices.



Hamish Sinclair

Partner, Corient, UK

Hamish Sinclair is a Partner and is a part of the Business Development Team at Corient. His experience includes positions with Stonehage Fleming, Credit Suisse and Deloitte. Hamish is a Chartered Accountant and serves as Chair of Afrika Tikkun UK and Honorary Treasurer of The Richard Dimbleby Cancer Fund.



Jonathan Speck

Senior Partner, Mourant, Jersey

Jonathan Speck is a Jersey Advocate and Partner of Mourant, specialising in commercial litigation, principally involving contentious and non-contentious trust cases. He has written and lectured about these topics around the world. In 2017, Jonathan was elected as an Academician of the International Academy of Estate and Trust Law in recognition of his contribution to the profession. Jonathan is Chair of Mourant Group, a role he assumed on 1 February 2025, and is responsible for Board effectiveness and engagement with shareholders and stakeholders. He previously served as the firm's Senior Partner. He has been a Partner since 1996 and previously served as Managing Partner of the Jersey Office and President of the Law Society of Jersey between 2014 and 2017.



Adam Streisand

Partner, Sheppard, Mullin, Richter & Hampton, USA

Adam Streisand is a Partner at Sheppard, Mullin, Richter & Hampton. He is known for high-profile victories in courtrooms across the U.S. He is credited with rescuing both NBA franchises in Los Angeles, having represented former Microsoft CEO Steve Ballmer at trial against Donald Sterling over the Clippers, and Jeanie Buss in litigation over control of the Lakers. Streisand also represented Dea Spanos Berberian and Georgia Angelos in litigation involving succession and control over the LA Chargers and Baltimore Orioles, respectively. Streisand is repeatedly named one of the most influential people in California due to his success in battles involving the rich and famous, including Rupert Murdoch, Michael Jackson, Tom Petty, Hugh Hefner, Muhammad Ali, Ray Charles, Marilyn Monroe, Marlon Brando, Barry White, Dennis Hopper, Michael Crichton, Anna Nicole Smith, Rodney Dangerfield, Rock Hudson, Joey Bishop, Bing Crosby, Diana Ross, Gore Vidal, Britney Spears, Alan Thicke, Kobe Bryant, Diane Keaton, Leonard Cohen, Chad Boseman, David Lynch and many others.



Elspeth Talbot Rice KC

Barrister, XXIV Old Buildings, UK

Elspeth Talbot Rice KC is a Barrister at XXIV Old Buildings. Described in the directories as "the smiling assassin", and crowned Chambers and Partners' Chancery Silk of the Year 2018, Elspeth is a highly sought after court advocate who commands a wealth of international trusts expertise. She acts in international trust matters for private clients and commercial enterprises across the globe, combining her knowledge and depth of experience with incisive legal analysis, clarity of expression, practicality, supreme approachability, energy and zest, a strong court presence and superb advocacy. Chambers & Partners, Chambers Global and Legal 500 as well as Citywealth Leaders all recommend her as a leading silk. Citywealth Leaders quotes a market source as saying " Elspeth embodies all of the qualities we look for in our leading counsel: intellectual rigour, fierce determination, engagement with the client and the detail of the case, composure under pressure, commerciality and articulate leadership.



John Teitler

Partner, Teitler & Teitler, USA

John Teitler is a Partner at Teitler & Teitler. Described by Chambers as “a luminary in the field” and “a force of nature,” John’s practice is centered on ultra-high net worth family law, trusts & estate law, and often the intersection of these two practice areas. He has served as lead counsel in some of the largest matrimonial and trust cases in the world and has also handled large cross-border trust planning matters and disputes. His practice also includes art law (disputes over ownership and valuation as well as purchase/sale transactions and succession planning), tax controversies, guardianship issues, and cross-border marital agreements. John has advised clients in the U.S. and throughout the world. John has been elected to the International Academy of Family Lawyers and the International Academy of Estate and Trust Law. John is the third generation of his family to act as Senior Partner of Teitler & Teitler, LLP, a New York-based law firm.



Heather Tibbo

Chief Executive Officer, Crestbridge Fiduciary, Jersey

Heather Tibbo is the Chief Executive Officer of Crestbridge Fiduciary. Based in Jersey, Heather is one of the private wealth industry’s most recognised and respected professionals, with over 25 years’ experience in the UHNW sector. A founder of Crestbridge Fiduciary and CEO since 2023, she has played a central role in shaping the firm’s culture, strategic direction and international growth. A trained lawyer, Heather has dedicated her career to supporting UHNW individuals, families and corporate clients through comprehensive family office services. She brings extensive expertise in developing and managing client and intermediary relationships. In 2026, Heather led the firm’s acquisition of a US fiduciary services provider, broadening its capabilities and the opportunities available to clients, while strengthening its proposition for families with complex cross-border interests. Heather’s leadership has been recognised through numerous prestigious industry awards across a number of jurisdictions. She also regularly features in annual rankings of the most influential figures in private wealth.



Marco Toracca

Global Director, Sotheby's, UK

Marco Toracca is the Global Director of the Restitution Department at Sotheby's, where he leads the auction house's efforts in addressing and resolving complex restitution and repatriation matters. A qualified attorney, he advises on provenance-related risk across the Sotheby's international sales and has overseen a number of landmark cases spanning Nazi-looted art and contested cultural patrimony. He works alongside families and heirs, their legal representatives, museums, private collectors and governments, guiding matters from provenance research through to resolution, and pairs rigorous legal analysis with the discretion these cases demand. He studied law on the Double Maîtrise course between King's College London and Paris 1 Panthéon-Sorbonne, and then completed the Sotheby's Institute Master's Degree in Art Business in New York and a separate Diploma in provenance research. He is a qualified as a solicitor-advocate in England. When in private practice, he specialized in sovereign state arbitration.



filippo Turato

Partner, Capital Trustees, Switzerland

Filippo Turato is a Partner and Member of the Executive Committee at Capital Trustees AG. A highly regarded professional in cross-border private client advisory, he specializes in the implementation of complex multinational wealth planning solutions for high-net-worth families. He advises clients across Europe, LATAM, and the Middle East, while also building and managing trusted relationships with institutional partners. Combining an empathetic, client-centric approach with sharp strategic focus, Filippo excels at anticipating client needs and cutting through complexity to focus on core strategic priorities. Earlier in his career, Filippo developed extensive experience in trust and wealth structuring at a leading Italian law firm. He is a regular speaker at international conferences and frequently contributes to academic and professional publications. He is widely recognized for his contributions to the Swiss trust industry, particularly in relation to the regulatory framework applicable to professional trustees and the use of Private Trust Companies in Switzerland. His standing is consistently highlighted in leading international directories, including Chambers and Partners and the Private Client Global Elite. Filippo holds a Law degree from Bocconi University in Milan. He is Chair of STEP Lugano, former Chair of STEP Verein, serves on various committees of the Swiss & Liechtenstein STEP Federation, and is a member of the International Fiscal Association (IFA). He speaks English and Italian.



Edward Turner

Team Leader Private Banking, Dreyfus Sons & Co., Switzerland

Edward Turner is a Team Leader and leads a team of private bankers at Dreyfus Sons & Co. Banquiers focused on advising international families and entrepreneurs. An economist by training, he holds an MBA from the University of Cambridge and a CFA. He also serves on the board of the US subsidiary of an Italian family-owned industrial group, alongside members of the third generation of the owning family. His work focuses on long-term wealth management, investment architecture/strategy, and the needs of entrepreneurial families across generations.



Marco Turnquest

Partner, Lennox Paton, Bahamas

Marco Turnquest is a Partner and an Attorney at Lennox Paton and a highly experienced Commercial Litigator. His practice is broad and focuses on both chancery and commercial litigation. He acts in a wide range of commercial and business disputes particularly in the fields of trusts, banking, corporate and insolvency. Marco also has a strong advisory practice acting for trustees, personal representatives and beneficiaries on all issues that arise during the administration of trusts, estates and pension schemes. He also has a wealth of experience in drafting complex trusts instruments and contracts. Marco is ranked as a leading lawyer in Chambers, Chambers High Net Worth, The Legal 500 Caribbean, and as one of Citywealth's Top 100 Trust Litigators.



Pekka Tuunainen

Managing Partner, Pekka Tuunainen Attorneys, Finland

Pekka Tuunainen is a Managing Partner at Pekka Tuunainen Attorneys. Pekka is admitted to the Finnish Bar and holds a Doctor of Laws and a Master's degree. He is a leading Finnish private client adviser for individuals and families, and represents his clients in all courts in Finland. Pekka is a frequent speaker at legal training events and conferences, and also acts as an expert witness in foreign courts on Finnish legislation. He has clients with an international focus and he is well connected around the world. Before becoming a full-time attorney, Pekka was a member of the Faculty at the University of Helsinki Faculty of Law and lectured on family and inheritance law.



Maud Udry-Alhanko

Partner, MLL Legal, Switzerland

Maud Udry-Alhanko is Partner in the private client group of MLL Legal, which she joined in 2008 as an associate. Holder of an LL.M. from Duke University (2005), she passed the New York Bar (2006) and is admitted to the Swiss Bar (2006). Qualified by the Swiss Bar Association as a Certified Specialist SBA Family law, Maud Udry-Alhanko has considerable experience in this field with an emphasis on divorce and estate issues, most often with a very strong international component. She also advises entrepreneurs and affluent clients in their relocation to Switzerland, often involving complex cross border aspects, in particular with regard to immigration, real estate matters, fiscal affairs and to art law. Maud Udry-Alhanko is a member of the Society of Trust and Estate Practitioners (STEP). She also regularly advises Swiss charitable foundations, sitting on the board of several foundations.



Sonia Velasco

Partner, Cuatrecasas, Spain

Sonia Velasco is a Partner at Cuatrecasas. Sonia's cross-border practice involves advising private clients/family offices in their investments, including investments in private equity, venture capital, start ups, estate planning, family governance and relocations in and out of Spain. She also advices clients in executive compensation and pension plans. She is well versed in vehicles such as trusts, which do not have a precise counterpart in Spanish law.



Nathalie Vetsch-Cevallos

Partner, Lenz & Staehelin, Switzerland

Nathalie Vetsch-Cevallos is a Partner at the Swiss law firm Lenz & Staehelin. She advises private clients in matrimonial, estate and wealth planning. She has extensive experience in inheritance law, matrimonial law, family governance and trust. She also provides support to clients and their businesses in commercial law and internal investigations. She is an affiliated member of STEP and is currently pursuing her STEP Diploma.



Lisa Vizia

Director, Saffery Trust, Guernsey

Lisa Vizia is a Director at Saffery Trust. Lisa heads up a family office team in Guernsey which manages international structures for ultra-high-net-worth families, focusing on the Middle East. She is also a Director of the firm's Cayman Islands office, which launched in 2020. Lisa works in partnership with a diverse client base, including over 20 years' experience with Middle Eastern clients. With a comprehensive and deep understanding of Shari'a Law and the devolution of Middle Eastern Estates, Lisa is considerate of cultural sensitivities and the complexities of managing such trust and company structures. In addition, Lisa specialises in dealing with luxury assets and exotic investments and has extensive experience in managing structures involving substantial fine art, jewellery, and antiquities as well as non-standard investments such as operational businesses. Lisa is also highly experienced in international assets including substantial marketable and private investments together with real estate acquisition, development, and operation of residential, commercial and hotel assets. Lisa is highly regarded as an industry leader, winning multiple awards for her outstanding work ethic, including WealthBriefing's Leading Individual Advisor award, repeated inclusion in Eprivateclient's 50 Most Influential rankings, most recently in 2026, and the Private Client Global Elite directory since 2019. She also leads the Guernsey office's flagship Corporate Social Responsibility initiative, reflecting her commitment to making a positive impact.



Kathryn von Matthiessen

Partner, Katten Muchin Rosenman, USA

Kathryn von Matthiessen is a Partner in Katten's Private Wealth practice and a member of the Private Client Services group. She focuses primarily on sophisticated personal and estate planning for high net-worth individuals and the administration of complex estates and trusts, including the representation of trust companies on fiduciary matters. Kathryn handles intricate estate planning for both domestic and international families, utilizing a wide variety of techniques (both charitable and non-charitable in nature) to minimize taxes and achieve her clients' goals. Kathryn's experience in international private client work is extensive, with respect to both inbound and outbound planning. She has been named one of Latin America's top 100 female lawyers by Latinvex, by Legal Week to its Private Client Global Elite Lawyer list, by Citywealth to its Leaders List and as one of the Powerwomen of the Year- North America Silver Award, 2019, North America Gold Award, 2020 and USA Gold Award, 2024, by Best Lawyers in America Trusts and Estates, 2019–2025 and Chambers ranked High Net Worth, New York, Private Wealth Law, 2019–2024.



Sarah von Schmidt

Partner, Farrer & Co., UK

Sarah von Schmidt is a Partner at Farrer & Co. 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 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. Sarah acts for a wide range of family offices, family businesses, entrepreneurs, wealthy families and individuals, and trustees of landed estates including those with heritage assets. "Sarah von Schmidt is deeply experienced, knowledgeable and can juggle the complexities of various legal systems masterfully. Sarah is highly respected in our field by fellow lawyers and advisors, and inspires loyalty and gratitude in her clients. She also has a charismatic personal charm and talent for creating camaraderie and trust within the teams she leads." (Legal 500 2025)



Richard Wakeham

Group Head of Private Wealth & Strategic Partnerships, ZEDRA Group, UK

Richard Wakeham is a Group Head of Private Wealth & Strategic Partnerships. Richard leads ZEDRA Group's business and client development activities focusing on client retention/satisfaction and intermediary partnerships. Richard also spends a significant portion of his time identifying and implementing optimal solutions for ZEDRA's existing and new clients. Richard's career began as a trust administrator before studying Marketing, Business and Law. Richard practised law between 2004 and 2012, and had a varied commercial, trust, corporate and litigation practice during that time. Between 2012 and 2021, Richard worked as an in-house lawyer (Fiduciary Specialist, Deputy Head of Fiduciary and Global Head of Legal & Structuring) before assuming his current role advancing the commercial interests of the ZEDRA Group.



Shân Warnock-Smith KC

Barrister, ICT Chambers/5 Stone Buildings, Cayman Islands

Shân Warnock-Smith KC is a Barrister at ICT Chambers/5 Stone Buildings and is one of the leading King's Counsel practising in the private field internationally. She is primarily based in the Cayman Islands but travels the world advising and litigating in contentious and non-contentious matters that often involve complex trust or similar structures or in connection with complex estates. She has appeared in a number of the leading cases in these areas. Shân is also a mediator of trust and estates disputes and is frequently called upon to provide expert opinions on Cayman or other laws for use in proceedings in other directions. Shân also acts as a protector and as a trustee director of a private trust company.



Julian Washington

Head of Tax, Heritage and UK Museums and Fiduciary Client Group – Europe, Sotheby's, UK

Julian Washington is Head of Tax, Heritage and UK Museums and Fiduciary Client Group – Europe at Sothebys. Julian leads Sotheby's Tax & Heritage team in London which assists clients with art and cultural property matters. A particular focus is the special tax treatment which is available for qualifying heritage property in the UK. Julian also helps to manage Sotheby's network of professional advisers; partnering with them, to bring the full range of Sotheby's expertise into play, for them and for their clients. Julian is a solicitor and a member of the Society of Trust and Estate Practitioners (STEP). the Art Lawyers Association (ALA) and Professional Advisors to the International Art Market (PAIAM). Prior to joining Sotheby's in 2024, his career began in the legal profession, having qualified as a solicitor in 1993.



Alex Way

Partner, Ogier, UK

Alex Way is a Partner in Ogier's Private Wealth team and is based in the London office. Alex advises trustees, settlors, beneficiaries and power holders on international private client structures, with particular expertise in the use of trusts, companies and foundations. His work includes the establishment of complex new structures, restructurings, the termination of existing structures, and the day-to-day administration and operation of private wealth structures.



Kinga Weiss

Partner, Walder Wyss, Switzerland

Kinga Weiss is a Partner and co-head of the Private Client practice of Walder Wyss. She focuses on estate planning, successions, family law and matrimonial property matters as well as incapacity planning and has significant expertise in estate disputes and divorces. Multijurisdictional cases account for the bulk of her field of action. She regularly holds speeches and publishes articles in and outside of Switzerland. She chairs the Schulthess Forum conference on successions and is the country correspondent for the Oxford journal Trusts & Trustees. Kinga is a member of STEP, IAETL and a fellow of ACTEC. She is one of the top-ranked Band 1 private client lawyers and Band 2 family law lawyers in Switzerland in the Chambers High Net Worth Guide. She is also recognized as a leading expert by Legal 500, Who's Who Legal (ranked as "Thought Leader") and The Best Lawyers in Switzerland.



David Wilson

Partner, Schellenberg Wittmer, Switzerland

David Wallace Wilson is a Partner in Schellenberg Wittmer's Geneva office, where he heads the Private Wealth group. His main areas of practice include international wealth structuring as well as trust and estate litigation. He has acted as expert for the Swiss government and as expert witness in notable UK/offshore disputes. Qualified in Switzerland and New York, David is ranked band 1 by Chambers HNW and a thought leader by Lexology Index. Recipient of the STEP Founder's Award for Outstanding Achievement, David is the former chair of STEP Geneva, a former editor of the Trust Quarterly Review and the founder of Trusts.ch – the leading website on trusts in Switzerland.



Richard Wilson KC

Barrister, Serle Court, UK

Richard Wilson KC is a Barrister at Serle Court. He is ranked by the directories as one of the leading trusts and estates silks, practising in a wide range of jurisdictions where he deals with both contentious and non-contentious matters for a wide range of clients including trustees and beneficiaries. He has appeared in many of the most significant and high-value private client cases of recent times, including Futter v HMRC and Wong v Grand View.



Valerie Wu

Managing Partner, Valerie Wu Law Corporation, Singapore

Valerie Wu is the Managing Partner at Valerie Wu Law Corporation. Valerie set up the Tax and Private Wealth practice for Pinsent Masons in Asia, recognised as Top tier practice by Legal 500 since 2018. She is going independent with the establishment of the Valerie Wu Law Corporation in September 2026. She advises global families, individuals, their family offices and service providers in tax, trust funds and regulatory matters; acts as trusted counsel to many UNHW individuals & families, on the tax considerations of family asset holding structures, to tailor solutions and provide ongoing advice for tax and succession planning needs, balanced with commercial, family dynamics and business continuity considerations. Her contributions beyond practice include serving on YWCA's philanthropic committee, the Law Reform Committee of the Singapore Academy of Law since September 2016, Law Society's Women in Practice as well as AML committees



Giorgia Zanetti

Associate, Maisto e Associati, Italy

Giorgia Zanetti is an Associate at Maisto e Associati and was admitted to the Italian 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, personal and estate planning, taxation of trusts and high net worth individuals.



Andrea Zavos

Senior Partner, Boodle Hatfield, UK

Andrea Zavos is the Senior Partner of Boodle Hatfield and a member of the contentious trust & estates team. She specialises in advising individuals, trustees and trust companies in complex, high value disputes both domestically and internationally. Andrea is aware that family relationships are often at stake and approaches the resolution of disputes with that in mind. She is highly regarded for her ability to engage with clients and other professionals in a sympathetic and constructive manner. She is able to absorb the emotive issues whilst focussing on the end game when acting for family members or trustees. She works closely with wealthy families on generational succession planning including wills, trusts, wealth protection structures and pre and post nuptial agreements.



Basil Zirinis

Partner, Sullivan & Cromwell, UK/USA

Basil Zirinis is a Partner and leads Sullivan & Cromwell's international private client practice from London and New York. He represents, individuals, fiduciaries, and family-controlled businesses throughout the world in a broad range of matters, including domestic and international estate and trust planning and litigation, family business governance and transition, and estate and trust administration. He speaks regularly at international conferences regarding U.S. and international tax and estate planning, and co -chaired the international private client forum at the Villa d'Este for 10 years from 2013 to 2023. Basil has extensive experience in international trust and estate litigation and has been involved in many of the leading litigations in this area in the last 25 years in the United States and abroad. These range from the highly publicized litigation involving Chicago's Pritzker family in the United States and the Bahamas, to the America's Cup trust litigation in New York, to several multi-billion-dollar trust litigations in Bermuda, the Caribbean and Europe, to a current trust litigation in Jersey that has received much press, to Italian and Spanish inheritance disputes pending in the courts of New York. He is a member of the International Academy of Estate and Trust Law, The Society of Trust and Estate Practitioners ("STEP"), and the American College of Trust and Estate Counsel ("ACTEC").



Sébastien Zulian

Partner, LALIVE, Switzerland

Sébastien Zulian is a Partner at LALIVE. He specialises in private client, inheritance and commercial law. He advises and represents individuals, families and fiduciaries in domestic and cross-border matters, with a particular focus on inheritance disputes, estate planning and family business issues. His practice includes acting in (pre-)contentious estates and trust-related disputes, succession planning (including pre-nuptial arrangements and cross-border structuring), and mandates involving executorship or protector roles. He regularly advises on Swiss-based and international estate matters involving complex holding structures and multi-jurisdictional family interests. Sébastien also undertakes related commercial and criminal matters affecting private clients, including financial disputes and asset recovery proceedings. He is a SBA Certified Specialist in inheritance law (Avocat spécialiste FSA droit des successions).

BUTTERFIELD

Trust that stands the test of time.

At Butterfield, we've been safeguarding the wealth of families and institutions for generations.

With a presence across Bermuda, Cayman, Guernsey, Singapore, Switzerland and The Bahamas, our experienced professionals bring together deep fiduciary expertise and dedicated personal service - supported by the strength, stability and convenience of Butterfield's offshore banking operations.

Lets start a conversation about how we can help your clients structure, preserve and grow their legacy.



Mike Neff

GROUP CHIEF OPERATING OFFICER, BERMUDA

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Phil Lenz

MANAGING DIRECTOR, SWITZERLAND

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Stuart Bray

SENIOR CLIENT SERVICES DIRECTOR, GUERNSEY

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DELEGATE LIST

Name	Job Title	Company	Jurisdiction
Alexandra Adrot-Castorina	Partner	Adrot-Castorina Bonnet Avocats	France
Iñigo Aguirrezabala	Partner	Cuatrecasas	Spain
Bryan Andersen	Senior Vice President	The Bryn Mawr Trust Company of Delaware	USA
Hannes Arnold	Senior Partner	Gasser Partner Rechtsanwälte	Liechtenstein
Eesha Arora	Partner	Maurice Turnor Gardner	UK
Jonathan Arr	Partner	Macfarlanes	UK
Emilie Aubert	Senior Associate	Lenz & Staehelin	Switzerland
Bruno Bächli	Partner	Wenger Vieli	Switzerland
Daniel Bader	Partner	Bär & Karrer	Switzerland
Richard Bagnall-Smith	Founding Director	Cadell	UK
Camilla Baldwin	Founding Partner	Camilla Baldwin	UK
Piers Barclay	Partner	Macfarlanes	UK
Alessandro Bavila	Partner	Maisto e Associati	Italy
Giles Baxter	Managing Director, Head of Technical Trust	RBC Trust Company	Jersey
Jack Bernstein	Senior Partner	Aird & Berlis	Canada
Nicolas Bracher	Partner	Wenger Vieli	Switzerland
Stuart Bray	Senior Client Services Director	Butterfield Trust	Guernsey
Alberto Brazzalotto	Partner	Maisto e Associati	UK & Italy
Anna Bruce-Smith	Director	Conyers	Bermuda
José Calejo Guerra	Partner	CCSL Legal	Portugal
Berenice Carrasquedo	Founding Partner	BFC Asesores	Mexico
Florentino Carreño	Partner	Cuatrecasas	Spain
Alex Carruthers	Founding Partner	Hughes Fowler Carruthers	UK
Marco Cerrato	Partner	Maisto e Associati	Italy
Judith Chatoo	Head of Private Clients	Saffery Trust	Switzerland
Jacqui Cheshire	Partner	Corient	Switzerland
Eleni Christou	Counsel	Lenz & Staehlin	Cyprus

DELEGATE LIST

Name	Job Title	Company	Jurisdiction
Giuseppe Ciucci	Partner, Executive Chair of EMEA	Corient	Jersey
Russell Cohen	Partner	Farrer & Co.	UK
Jonathan Conder	Partner	Stephenson Harwood	UK
James Cook	Partner	Russell Cooke	UK
Gilead Cooper KC	Barrister	Wilberforce Chambers	UK
David Córdova Flores	Partner	Charles Russell Speechlys	Luxembourg
Willem-Joost de Gier	Co-Founder	Cadell	UK
Andrew De La Rosa	Barrister and Attorney	ICT Chambers	Cayman Islands
Guadalupe Diaz-Sunico Aboitiz	Partner	Gomez-Acebo & Pombo	Spain
Javier Estella	Managing Partner	Avantia Asesoramiento Fiscal y Legal	Spain
Elina Filippou	Partner	Zepos & Yannopoulos	Greece
Francesco Frattini	Partner	Gasparro Frattini e Associati	Italy
Daniel Gabrieli	Partner	Wenger Plattner	Switzerland
Patricia Garcia Mediero	Partner	Avantia Asesoramiento Fiscal y legal	Spain
Jean-Charles Gardetto	Managing Partner & Founder	Gardetto Law Offices	Monaco
Johannes Gasser	Senior Partner	Gasser Partner Rechtsanwälte	Liechtenstein
Alexandra Geiger	Partner	MME Legal	Switzerland
Paolo Giacometti	Partner	Chiomenti	Italy
Thomas Giordano-Lascari	Partner	Greenberg Glusker	USA
Dame Elizabeth Gloster		One Essex Court	UK
Carolina Goette	Counsel	Walder Wyss	Switzerland
Claire Gordon	Partner	Farrer & Co.	UK
Patricia Guerra	Partner	MLL Legal	Switzerland
Dakis Hagen KC	Barrister	Serle Court	UK

DELEGATE LIST

Name	Job Title	Company	Jurisdiction
Mark Harper	Partner	Hughs Fowler Curruthers	UK
Florence Hediger	Partner	MLL Legal	Switzerland
Helen Hendy	Executive Director - Private Wealth	Praxis	Jersey
Rebecca Hick	Partner	Camilla Baldwin	UK
Jonathan Hilliard KC	Barrister	Wilberforce Chambers	UK
Paul Hodgson	Non-Executive Chairman	Praxis	Guernsey
Balz Hösly	Partner	MME Legal	Switzerland
Josephine Howe	Partner	Ogier	Jersey
Flora Hussey	Partner	Payne Hicks Beach	UK
Ingrid Iselin	Partner	Kellerhals Carrard	Switzerland
Nicholas Jacob	Partner	Forsters	UK
Alex Jones	Partner	Rawlinson & Hunter	UK
Jennifer Jordan McCall	Partner	Pillsbury Winthrop Shaw Pittman	USA
Natasha Kapp	Partner	Carey Olsen	Guernsey
Gilly Kennedy-Smith	Partner	Mourant Ozannes	Guernsey
Elizabeth Kubanik	Partner	Sullivan & Cromwell	UK
Phil Lenz	Managing Director	Butterfield Trust	Switzerland
Daniel Leu	Partner	Bär & Karrer	Switzerland
Charlie Lilwall	Director, Strategic Accounts	TransPerfect Legal	UK
Meir Linzen	Chairman	Herzog Fox & Neeman	Israel
Charles Lloyd	Partner	Harbottle & Lewis	UK
William Longrigg	Partner	Charles Russell Speechlys	UK
Paolo Ludovici	Partner	Ludovici Piccone & Partners	Italy
Craig MacIntyre	Director, Co-Head of Private Client and Trust	Conyers	Bermuda
Henry Mander	Global Head of Trusts & Private Wealth	Harneys	UK
Justine Markovitz	Senior Partner	Withers	Switzerland
Piers Master	Partner	Charles Russell Speechlys	UK
Clare Maurice	Founding Partner	Maurice Turnor Gardner	UK
Gail McCourt	Head of RBC International Trusts	RBC Trust Company	Jersey

DELEGATE LIST

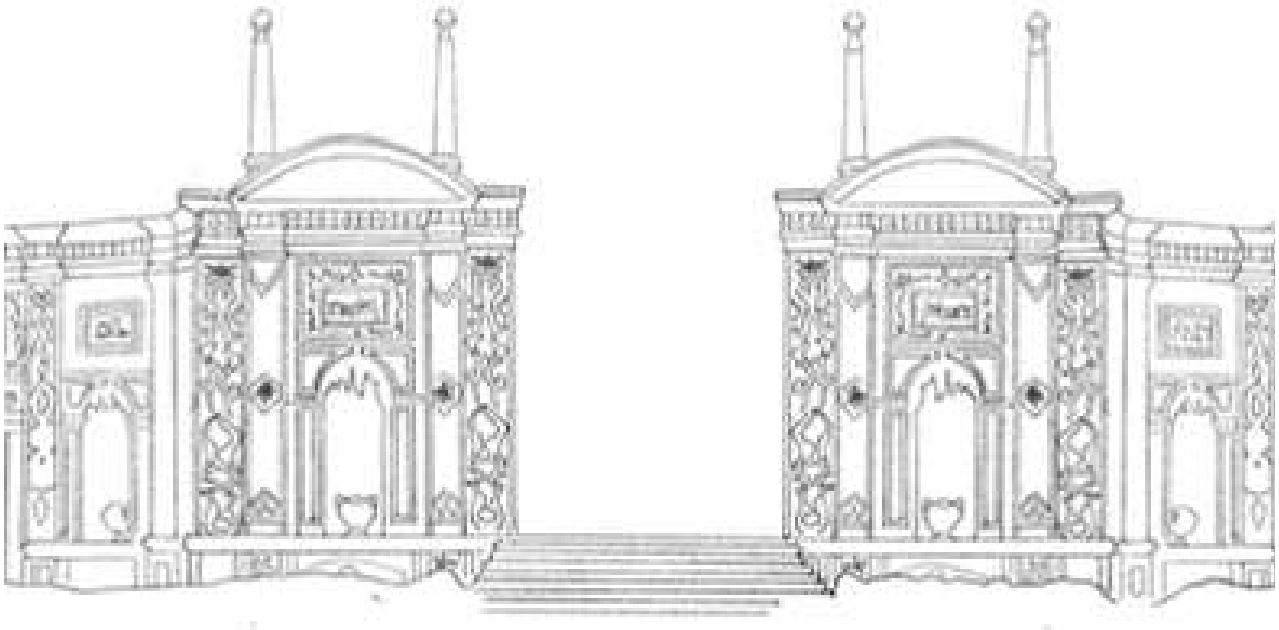
Name	Job Title	Company	Jurisdiction
Andrew Mold KC	Barrister	Wilberforce Chambers	UK
Dame Penny Mordaunt	Former Secretary of State for Defence of the United Kingdom		UK
Bertold Mueller	Managing Director, EMEA	Christie's	Switzerland
Michael Neff	Group Chief Operating Officer	Butterfield Trust	Bermuda
Xavier Nicholas	Partner, Head of Private Client	Forsters	UK
Matthias Niedermüller	Founder and Managing Partner	Niedermüller Attorneys at Law, Vaduz	Liechtenstein
Luca Nievo	Director	MIDAS Wealth Management	Luxembourg
Alain Nijs	Partner	NijsDraye	Belgium
Francesca Nizzoli	Associate	Chiomenti	Italy
Margaret O'Sullivan	Managing Partner	O'Sullivan Estate Lawyers	Canada
Raul-Angelo Papotti	Partner, Head of Tax	Chiomenti	Italy
Marni Pernica	Partner	Aird & Berlis	Canada
Andrew Perree	Director, Head of Special Projects	RBC Wealth Management	Jersey
Anthony Poulton	Partner	Baker McKenzie	UK
Omar Puertas-Álvarez	Legal Innovation Partner	Harvey AI	Spain
Philippe Pulfer	Partner	Walder Wyss	Switzerland
Beatrice Puoti	Partner	Stephenson Harwood	UK
Shawntel Randi	Partner	Rubin and Rudman	USA
Keith Robinson	Partner	Carey Olsen	Bermuda
Jay Rosenbaum	Partner	Nixon Peabody	USA
Joshua Rubenstein	Partner and Global Chair	Katten Muchin Rosenman	USA
Heini Rüdisühli	Deputy Managing Partner	Lenz & Staehelin	Switzerland
Humberto Sanches	Managing Partner	Humberto Sanches e Associados	Brazil
Amelie Sarrado	Director, Head of Private Office	Christie's	UK
Alexa Saunders	Partner	Carey Olsen	Jersey

DELEGATE LIST

Name	Job Title	Company	Jurisdiction
Clemens Philipp Schindler	Founding Partner	Schindler Attorneys	Austria
Rosie Schumm	Partner	Forsters	UK
Rahul Sharma	Partner	Fasken	Canada
Natalie Sherborn	Partner	Withers	UK
Hamish Sinclair	Partner	Corient	Partner
Jonathan Speck	Senior Partner	Mourant	Jersey
Adam Streisand	Partner	Sheppard Mullin Richter & Hampton	USA
Elspeth Talbot Rice KC	Barrister	XXIV Old Buildings	UK
John Teitler	Partner	Teitler & Teitler	USA
Heather Tibbo	Chief Executive Officer	Crestbridge Fiduciary	Jersey
Marco Toracca	Global Director	Sotheby's	UK
Filippo Turato	Partner	Capital Trustees	Switzerland
Edward Turner	Team Leader Private Banking	Dreyfus Sons & Co.	Switzerland
Marco Turnquest	Partner	Lennox Paton	Bahamas
Pekka Tuunainen	Managing Partner	Pekka Tuunainen Attorneys	Finland
Maud Udry-Alhanko	Partner	MLL Legal	Switzerland
Sonia Velasco	Partner	Cuatrecasas	Spain
Nathalie Vetsch-Cevallos	Partner	Lenz & Staehelin	Switzerland
Lisa Vizia	Director	Saffery Trust	Guernsey
Kathryn von Matthiessen	Partner	Katten Muchin Rosenman	USA
Sarah von Schmidt	Partner	Farrer & Co.	UK
Richard Wakeham	Group Head of Private Wealth & Strategic Partnerships	ZEDRA Group	UK
Shân Warnock-Smith KC	Barrister	ICT Chambers/5 Stone Buildings	Cayman Islands

DELEGATE LIST

Name	Job Title	Company	Jurisdiction
Julian Washington	Head of Tax, Heritage and UK Museums and Fiduciary Client Group – Europe	Sotheby's	UK
Alex Way	Partner	Ogier	UK
Kinga Weiss	Partner	Walder Wyss	Switzerland
David Wilson	Partner	Schellenberg Wittmer	Switzerland
Richard Wilson KC	Barrister	Serle Court	UK
Valerie Wu	Managing Partner	Valerie Wu Law Corporation	Singapore
Giorgia Zanetti	Associate	Maisto e Associati	Italy
Andrea Zavos	Senior Partner	Boodle Hatfield	UK
Basil Zirinis	Partner	Sullivan & Cromwell	UK/USA
Sébastien Zulian	Partner	LALIVE	Switzerland



OUR PARTNERS

BUTTERFIELD TRUST

www.butterfieldgroup.com

Butterfield is a leading offshore bank and trust company delivering financial and fiduciary solutions with a personal touch. Rooted in our small island heritage, we put relationships at the centre of everything we do, offering a full-service experience that feels curated and comfortable for each of our clients and advisers. Combining local expertise with global coverage, we deliver the advice, products and services to help clients accomplish their goals - and have done for over 160 years.

Our trust team provides multi-jurisdictional capabilities through six independent companies (Bermuda, The Bahamas, Cayman Islands, Guernsey, Singapore and Switzerland). We offer a flexible approach to holding a wide variety of assets, and prides ourselves on providing solutions to meet the varied requirements of private and institutional clients, family offices, charities and philanthropic organisations. Our award-winning team specialises in wealth planning and trust administration, and dealing with complex structures for the growth, protection and transfer of assets.

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).

THE BRYN MAWR TRUST COMPANY OF DELAWARE

www.bmt.com

Supporting global clients in the stewardship of their legacies, The Bryn Mawr Trust Company of Delaware is a Delaware chartered limited purpose trust company, with our roots dating back over 175 years. Today, we are now a wholly owned subsidiary of WSFS Financial Corporation, a publicly traded (WSFS) banking institution based in Wilmington, Delaware. We stand on a firm foundation, with corporate assets greater than $20 billion, and assets under management and administration in excess of $65 billion*.
We are a boutique trust company, which prides itself on client confidentiality and discretion, as well as 24-hour service standards. Our goal is to always be able to get to ‘yes’.

Serving clients from the United States and around the world, we can administer accounts without direct custody of assets and are experienced with unique client service requirements (such as privacy or unique assets). We have extensive knowledge of the wealth-friendly statutes collectively known as the Delaware Advantage and support all Delaware personal and business statutes. Working directly with your attorneys and advisors, we are able to serve in a variety of capacities for many of your estate planning or asset protection needs.

OUR PARTNERS

CADELL + CO

www.cadellco.com

At Cadell, we have a simple mission. Which is to help Private Client professionals and their clients navigate the market when they sell art.

We know from experience that one of the most difficult challenges is to get unbiased, trustworthy advice. Hardly a surprise in an unregulated marketplace, where huge returns are possible.

Cadell is independent and was conceived to deliver professional grade advice. We don't deal, broker or take introductory commissions. We just give advice, so can genuinely describe our services as independent. Our team of world class team of 35 experts is redefining art advisory. Delivering a new level of specialist and transparent advice with no conflicts of interest, focussed entirely on improving outcomes for our clients.

In 2020 Cadell won the STEP Boutique of the Year Award.

In 2021 we became the leading art advisor in Europe and opened an office in New York.

CAPITAL TRUSTEES

www.capitaltrustees.swiss

Capital Trustees is a professional, independent Swiss trust company with offices in Zürich and Lugano, specialising in the establishment and administration of trusts. The company:

- Was established in 2005 and has extensive experience in assisting international families with wealth structuring through bespoke Swiss solutions;
- Was among the first trust companies to be licensed by the Swiss Financial Market Supervisory Authority (FINMA);
- Is a full member of the Swiss Association of Trust Companies (SATC);
- Is privately owned and fully independent, with no affiliation to any family office, bank or financial group;
- Conducts its activities independently, focusing exclusively on trust-related activities and not providing asset management services, thereby minimising potential conflicts of interest;
- Provides all core trust services in-house, from drafting the relevant trust documents to the day-to-day administration and monitoring of trust assets. Compliance, Finance, Controlling and ICT functions are also managed internally to ensure direct control over processes and information flows. This approach is essential to safeguarding client confidentiality;
- Administers trusts governed by the laws of all major trust jurisdictions and holding assets across all asset classes;
- Offers bespoke wealth planning solutions, including the establishment of private trust companies and dedicated trust companies in Switzerland.

OUR PARTNERS

CAREY OLSEN

www.careyolsen.com

Carey Olsen has one of the largest offshore trusts and private wealth legal practices covering Bermuda, the British Virgin Islands (BVI), the Cayman Islands, Guernsey and Jersey. Our offices in Hong Kong and Singapore also ensure we can advise on both contentious and non-contentious matters in the Asian time zone. We work across a range of structures including private, corporate, charitable, purpose and commercial trusts, foundations, family offices, partnerships and companies. We advise on settlor reserved power trusts, private trust company arrangements, pension and employee benefit schemes, wills and matters of inheritance, international estate planning, regulatory advice and trust-related disputes. Our contentious trust team have appeared in many significant offshore trust cases to come before the courts, including representing clients before the Privy Council in the UK.

For more information on our services, please visit careyolsen.com

CHRISTIE'S

www.christies.com

Founded in 1766, Christie's is a world-leading art and luxury business with a physical presence in 46 countries throughout the Americas, Europe, Middle East, and Asia Pacific, and flagship international sales hubs in New York, London, Hong Kong, Paris and Geneva. Renowned and trusted for its expert live and online-only auctions, as well as bespoke Private Sales, Christie's unparalleled network of specialists offers clients a full portfolio of global services, including art appraisal, art financing, international real estate and education. Christie's auctions span more than 80 art and luxury categories, at price points ranging from $500 to over $100 million. Christie's has sold 8 of the 10 most important single-owner collections in history, achieved the world record price for an artwork at auction, launched the first fully on-chain auction platform dedicated to exceptional NFT art and manages an investment fund to support innovative startups in the art market. Christie's is also committed to advancing responsible culture throughout its business and communities worldwide.

CONYERS

www.conyers.com

Conyers' Private Client and Trust team, one of the largest in the Caribbean region, has a long-established reputation for providing intelligent, dependable advice to some of the world's wealthiest private clients.

The Conyers Private Client and Trust team is complemented by a team of experienced trust litigators with a worldwide reputation. The trust litigation team is at the forefront of both contentious and non-contentious trust litigation in Bermuda. They regularly act for act for trustees, beneficiaries, settlors and third parties.

Conyers is a leading international law firm with a broad client base including FTSE 100 and Fortune 500 companies, international finance houses and asset managers. The firm advises on Bermuda, British Virgin Islands and Cayman Islands laws, from offices in those jurisdictions and in the key financial centres of Hong Kong, London and Singapore.

OUR PARTNERS

CORIENT

www.corient.com

Corient is the world's largest non-bank wealth manager and multi-family office for high-net-worth individuals, families, and businesses. We put our clients' best interests first and are trusted by some of the world's most prominent and complex families.

Through our unique partnership model, our global network of 300+ partners and 3,000+ experienced professionals work together to combine deeply personal, local expertise with global scale to help our clients simplify their financial lives, protect their wealth and build enduring legacies.

CRESTBRIDGE FIDUCIARY

www.crestfos.com

Crestbridge Fiduciary helps ultra-high-net-worth families preserve and enhance their wealth across generations. Working directly with families and alongside their trusted advisers and intermediaries, we provide a comprehensive range of fiduciary services, including trust and company administration, accounting and reporting, luxury asset management and the establishment of philanthropic structures. Our experienced team combines practical expertise with a long-term perspective, providing the continuity and support families need to build lasting stability and pursue their interests and ambitions with confidence.

Privately owned and independent, we support clients with complex cross-border structures through our offices in Jersey and the USA, bringing together international expertise and a commitment to service excellence.

HARVEY

www.harvey.ai

Harvey is the operating system for legal and professional services. Our products streamline workflows in areas including contract analysis, due diligence, compliance, and litigation to drive efficiency and value. Law firms and legal teams around the world use Harvey to enable faster, smarter decision-making. Backed by world-class investors including Sequoia, Kleiner Perkins, a16z, Coatue, EQT, GIC, GV, Goldman Sachs Alternatives, J.P. Morgan, Lightspeed, and the OpenAI Startup Fund, Harvey is used by 3,500+ customers in 85+ countries.

OUR PARTNERS

KATTEN

www.katten.com

Katten is a full-service law firm with nearly 650 attorneys in locations across the United States and in London and Shanghai. We strive to be a firm of first choice for clients seeking sophisticated, high-value legal services nationally and globally. While Katten offers an extensive range of legal services across numerous industries, our core areas of practice include corporate, financial services, litigation, real estate, private credit, restructuring, intellectual property and private wealth. Among our clients are a wide range of public and private companies, including a third of the Fortune 100, as well as a number of government and nonprofit organizations and individuals. www.katten.com

MIDAS WEALTH MANAGEMENT

www.midas-wealth-management.com

Midas Wealth Management SA, based in Luxembourg and France, is a regulated investment company established in 2010 and led by an experienced team of entrepreneurs and financial professionals. Born from a collaboration between asset managers and wealthy clients, the company focuses on putting the customer at the heart of the relationship, offering high-quality services.
We specialize in wealth management for high-net-worth clients, providing investment management, as well as legal and tax support. Our primary business is managing investment funds, dedicated funds, as well as discretionary and advisory mandates.

Our philosophy centers on delivering conviction-based management grounded in a rigorous investment process tailored to the client's needs. We emphasize a long-term, fundamental approach aiming for stable returns while remaining responsive to macroeconomic and financial environments.
Our core values of trust, independence, transparency, confidentiality, and availability guide everything we do, ensuring relationships built on integrity and commitment.

Since 2020, Dreyfus Sons & Co Ltd, Banquiers has become our main shareholder, reinforcing our principles and investment process. Headquartered in Switzerland and next to a representative office in Tel Aviv, the bank has established through Midas Wealth Management a foothold in Europe

MLL LEGAL

www.mll-legal.com

MLL Legal is one of the leading law firms in Switzerland with offices in Zurich, Geneva, Zug, Lausanne, London and Madrid. We advise our clients in all areas of business law and in private client matters, where our team is very well-known and established. In the business sector, we stand out in particular for our first-class industry expertise in technical-innovative specialist areas, but also in regulated industries.

Our private clients team provides comprehensive legal and tax advice to individuals and their families in Switzerland and around the world on all aspects that can be relevant to their personal and financial affairs. With MLL Legal's roots going back to the 19th Century, our team has recognized expertise and a wealth of experience in servicing families over generations, in complex asset structuring and restructuring, estate planning and matrimonial agreements, international inheritance litigation and matrimonial property disputes, family governance, relocations including work and residence permits and philanthropy. Our clients appreciate our pragmatic, creative and solution-oriented advice and, of course, typically Swiss discretion!

OUR PARTNERS

OGIER

www.ogier.com

Ogier provides legal advice across BVI, Cayman Islands, Guernsey, Irish, Jersey and Luxembourg law. Our international network includes offices in Beijing, Dubai, Hong Kong, Ireland, London, Shanghai, Singapore and Tokyo.

Our Trusts Advisory Group brings together specialists from multiple jurisdictions and disciplines to deliver a seamless service on both contentious and non-contentious matters, supported by our wider corporate team. Ogier's Dispute Resolution team has a strong track record, having acted successfully in many of the leading international trust and private client matters in recent years in the BVI, Cayman Islands, Guernsey and Jersey.

Our Private Wealth team advises trustees, private banks and ultra-high-net-worth individuals on the full lifecycle of trusts, from establishment and restructuring to administration and succession planning. With extensive experience in trusts and foundations, we offer practical and flexible guidance to help clients select the most effective jurisdiction. The team works closely with our corporate specialists to provide commercially focused advice on the companies that support trust structures and on new investment structures as they arise.

PRÄSIDIAL GROUP

www.praesidial.com

The Präsidial Group is an independent Liechtenstein-based corporate group with a fiduciary tradition of more than 90 years. Since the establishment of Präsidial-Anstalt as one of the leading fiduciary companies in Liechtenstein in 1931, the group has stood for legally robust and sustainable long-term solutions for asset structuring and protection.

The Präsidial Group unites specialized entities in fiduciary services, legal advisory, and finance and accounting under one roof. Drawing on Liechtenstein’s stable political environment and progressive legal framework, the group focuses on tailored, multi-generational solutions for the sustainable structuring and protection of assets.

Tradition, professional expertise, and a forward-looking approach define the identity of the Präsidial Group.

OUR PARTNERS

PRAXIS

www.praxisgroup.com

At Praxis, we work with individuals, families, family offices and their advisers to structure, protect and manage wealth across generations.

We combine deep fiduciary expertise with a highly personalised approach. Whether you are overseeing a multi-jurisdictional investment structure, navigating family governance, supporting clients with their succession planning, or incorporating philanthropy into their strategy, our role is to bring clarity to complexity, providing seamless support for even the most sophisticated arrangements.

In close collaboration with legal, tax and investment teams, we deliver solutions tailored to our clients' values and goals and in line with regulatory requirements, often working across borders. Our services include wealth structuring, preservation and growth, succession planning and wealth transfer, family office support and private family fund setup and administration.

RAWLINSON & HUNTER

www.rawlinson-hunter.com

Rawlinson and Hunter is an international grouping of professional firms that provide advice to high net worth individuals and families with planning tailored to each client's needs and objectives, backed up by first rate trust, tax and accounting services.

For over 90 years, Rawlinson & Hunter has been providing outstanding services to our corporate and private clients, combining excellent technical skills with a uniquely personal approach. Our skills lie in maximising the rewards that prosperity can bring. For our private clients, we can take the strain, safeguarding their assets and allowing them to enjoy the benefits and not the burdens of wealth.

Our worldwide reputation has been built on our ability to deliver the best solutions to our clients, exactly when they need them.

RBC WEALTH MANAGEMENT

www.rbcwealthmanagement.com

At RBC Wealth Management, we help turn your ideas into reality. Whether you're growing wealth, planning retirement, or protecting your legacy, we support your goals. Our Jersey-based RBC professionals have extensive experience supporting clients with complex financial arrangements. Their knowledge of jurisdictional regulations, fiduciary structures, client priorities and the nuances of family dynamics ensures you receive informed and discreet advice. Through RBC's international network, you also gain direct access to specialists across multiple jurisdictions. This global reach supports your mobility and ability to adapt as your needs and priorities evolve.

OUR PARTNERS

SAFFERY TRUST

www.saffreytrust.com

Saffery Trust is a director-led firm of individually expert, collectively exceptional people. We provide tailored wealth structuring solutions, fiduciary and corporate services across our offices in Cayman, Dubai, Guernsey, Switzerland and UK offering. We help clients optimise their personal and business wealth and to create lasting legacies.

We specialise in bespoke succession and wealth planning services including complex, multi-jurisdictional wealth structures.

We have autonomy to consider any asset class on a risk-adjusted basis. We are at the forefront of industry in providing services for clients with digital assets, as well as being highly experienced in other non-standard assets, including arts, yachts and aircraft. The variety of assets we administer reflects the diversity of our global client base.

We work in partnership not only with our clients, but with their trusted advisors and our global network of specialists across a broad spectrum of service areas, including private banking, legal and finance.

SOTHEBY'S

www.sothebys.com

Established in 1744, Sotheby's is the world's premier destination for art and luxury. Sotheby's promotes access to and ownership of exceptional art and luxury objects through auctions and buy-now channels including private sales, e-commerce and retail. Our trusted global marketplace is supported by an industry-leading technology platform and a network of specialists spanning 40 countries and 70 categories which include Contemporary Art, Modern and Impressionist Art, Old Masters, Chinese Works of Art, Jewellery, Watches, Wine and Spirits, and Design, as well as collectible cars and real estate. Sotheby's believes in the transformative power of art and culture and is committed to making our industries more inclusive, sustainable and collaborative.

WALDER WYSS

www.walderwyss.com

Walder Wyss is one of Switzerland's leading law firms, with more than 300 legal experts across six fully integrated offices in Basel, Bern, Geneva, Lausanne, Lugano and Zurich. We advise national and international companies, entrepreneurs, private clients, family businesses, publicly held corporations and public institutions across the full spectrum of business law, including corporate and commercial, finance and capital markets, tax, private client, competition, IP/IT, regulatory, employment, real estate and dispute resolution. Our private wealth expertise combines technical excellence with a personal, responsive approach, supporting clients and their families in the structuring, preservation and transfer of wealth across generations and jurisdictions. Continuous growth, close proximity to our clients and a clear commitment to long-term, trusted relationships define the way we work.

OUR PARTNERS

ZEDRA

www.zedra.com

ZEDRA is a global powerhouse providing Corporate & Global Expansion, Active Wealth, Pension & Incentive services and Fund solutions, all aligned under one common goal: to embrace the future with surety. The firm's highly experienced teams enable high net worth individuals and families as well as, medium to large sized companies, pension funds and trustees, asset managers and their investors to focus on their core activities by choosing ZEDRA as their trusted partner of choice. As an experienced, reliable and innovative advisor, ZEDRA helps them successfully navigate estate planning, governance and global operations.

Ultimately, what ZEDRA delivers is complete peace of mind, knowing its expertise is supported by a robust, ethical approach, meeting the local and international requirements of the increasingly demanding regulatory environment.

ZEDRA inherited a wealth of knowledge and experience following its acquisition of trust businesses of a renowned bank in 2016. This solid foundation combined with innovative thinking has allowed ZEDRA to grow rapidly in a competitive marketplace to a team of 900+ industry experts across 16 countries spanning Asia, Oceania, the Americas and Europe.



MEET THE TEAM



Alexi Whitehouse

SVP, Private Client Global Elite Event Management

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Rachael Toovey

Senior Director, Global Membership Operations, Corporate and Private Client Global Elite

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francesca ffiske

Global Director, Private Client Global Elite

Currently on maternity leave

PRIVATE CLIENT

GLOBAL ELITE

UPCOMING EVENTS

December 3 - 4 2026	**Private Client Exchange UK** Estelle Manor, Oxfordshire, UK
February 3 - 5 2027	**Private Client Forum Americas** Banyan Tree Mayakoba, Mexico
February 25 2027	**Private Client Global Elite Celebration Dinner** 10-11 Carlton House Terrace, London, UK
March 3 - 5 2027	**Trust & Estates Litigation Forum** Four Seasons Astir Palace Hotel Athens, Greece
March 11 2027	**Private Client Women's Day** The Lanesborough, London, UK
March 18 - 19 2027	**Private Client Exchange Switzerland** Guarda Val, Lenzerheide, Switzerland

To discuss attendance, please contact Elle Jeffs

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UPCOMING EVENTS

April 18 - 19 2027	**Private Client Exchange Italy** Villa La Massa, Firenze, Italy
May 20 2027	**Minds of the Future Day** 116 Pall Mall, London, UK
June 7 - 8 2027	**Private Client Exchange Bermuda** Hamilton Princess & Beach Club, Bermuda
September 8 - 10 2027	**Minds of the Future Forum** Alexander House & Utopia Spa, West Sussex, UK
Sep to Oct 30 - 1 2027	**Private Client Exchange France** Château Saint-Martin & Spa, Cote D'Azur, France
October 28 - 29 2027	**Private Client Exchange Middle East** The Ritz-Carlton Ras Al Khaimah, Al Wadi Desert, UAE

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