

asset protection

ASSET PROTECTION: HOW TO USE TRUSTS AND LIFE INSURANCE CONTRACTS TO PROTECT YOUR CLIENTS' ASSETS?

27 May 2021

09.00 - 10.00

The use of trusts for asset protection

- How to create and manage trusts for asset protection purposes?
- Matrimonial and estate planning risks: which strategy should be followed to mitigate them?
- What are the consequences of the latest regulatory changes (CRS, DAC 6, FinIA, UBO registries...) on trusts?
- How to structure trusts to avoid disputes?

Dr. Georgia Fotiou, Partner, Staiger Attorneys at Law, Zurich

10.00 - 11.00

The power of Life Insurance: protect your client's wealth and reduce your professional risk

- What are the consequences of the latest legal changes (DAC 6, antimoney laundering legislation...)?
- Practical cases: how to use life insurance contracts to protect the assets of your clients?
- Matrimonial and successoral risks: which strategy should be followed to limit it?
- What are the benefits of life insurance contracts to protect clients' assets?
- Creation, administration and termination of life insurance contracts: how to proceed with?

Marc-André Sola, Chairman, 1291 Group, Zurich

11.00 - 12.00

Litigation cases: from theory to the facts

- What are typical disputes that arise between heirs or family members?
- Enforcement procedures: how to react?
- Practical cases where specific structures were attacked

Richard Gassmann, Of Counsel, Baker & McKenzie, Zurich

12.00

End of the conference



REGISTRATION FORM

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YOU MAY REGISTER

• By phone: +33 982 440 575

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• By Registration Form:

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You would like to pay by Wire Transfer ☐ By credit card* ☐ (*ONLY POSSIBLE IN EUR, please beware we do not accept AMEX cards) Card No. Exp.date .../.../...

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