

# 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 successional 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

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

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#### YOU MAY REGISTER

• By phone: +33 982 440 575

• By fax: +33 483 076 487

• By e-mail: contact@finixevents.com

• By Registration Form:

#### PARTICIPATION FEE: 550 CHF

Name .....

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Position .....

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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 .. / ..

#### DISCOUNT POLICY

In case of few registrations received from the same company, a 10% discount will be applied for the second, third and fourth participants registered for the conference.

#### CANCELLATION POLICY

There will be no penalty for cancellations received before 30 days prior to the first day of the conference. No refund will be issued for cancellations received less than 29 days before the first day of the conference. In that case registrants are enabled either to replace their attendance or to obtain a one year valid conference ticket to be used for one of our forthcoming events (therefore, for the second option, calculations will be done according to the original price of a declined conference ticket). All cancellations must be sent in writing by fax: +33 483 076 487 or by e-mail to contact@finixevents.com. The organisers reserve the right to modify the programme, speakers or venue should circumstances required.