MONDAY 24 FEBRUARY 2025	
18.00	**Welcome reception** Terrazza degli Aranci, Rome Cavalieri Hotel *Kindly supported by Belluzzo International Partners*
DAY 1: TUESDAY 25 FEBRUARY 2025 *Chair: Pamela Cross TEP, STEP Board Member; Global Congress Programme Chair; Partner, Borden Ladner Gervais LLP, Canada*	
08.00	**Registration and refreshments** Exhibits open
08.45	**Welcome from Chair** *Pamela Cross TEP, STEP Board Member; Global Congress Programme Chair; Partner, Borden Ladner Gervais LLP, Canada*
08.55	**STEP strategic update** *Kelly Greig TEP, Chair of STEP* *Mark Walley, CEO of STEP*
09.15	**Keynote 1: Lessons from Ancient Rome** How a rule of Roman law crossed the case law of English ecclesiastical courts and became a basic rule of contemporary trust law. *Professor Maurizio Lupoi, Professor Emeritus, University of Genoa, Italy*
09.45	**Mainstage Session 1 – Evolving attitudes to wealth** Drawing on their experience in practice and new STEP research that will be launched at this event, a multi-jurisdictional panel consider whether and how attitudes to wealth and tax are evolving, looking at the trends across different cultures and geographies and how these will impact approaches to wealth transfer and succession. *Moderator: Bryony Cove TEP, Partner, Farrer & Co, UK* *Nuno da Cunha Barnabe TEP, Abreu & Associados, Portugal* *Giovanna Gregori, Executive Director, AIDAF, Italy* *Sunita Singh-Dalal TEP, Partner, Head of Private Wealth & Family Offices, Hourani & Partners, UAE* *Valerie Wu TEP, Pinsent Masons, Singapore*
10.40	**Networking and refreshments**
11.10	**Keynote 2: Responsible stewardship: Placing purpose at the core** Responsible stewardship is not just about moving wealth from one generation to the next; it is about exploring how purpose can drive strategy for enhanced mutual value creation. Bruno Roche, founder of the Economics of Mutuality and

	former Chief Economist at Mars Incorporated, will discuss how companies achieve a higher level of performance and impact by putting purpose into practice. *Bruno Roche, Founder Economics of Mutuality, ONEconomy, Switzerland*
11.40	**Mainstage Session 2: Tackling economic crime: What next and where should responsibility lie?** We bring together a panel to discuss efforts to tackle economic crime. What are the issues, where are the gaps and what's next in addressing these? A panel with representatives from international standard setting bodies and the industry discuss the challenges and best way forward. *Moderator: Berry Bloomberg, Partner, Withers LLP, Switzerland/UK* *Fabrizia Lapecorella, Deputy Secretary-General, Organisation for Economic Co-operation and Development, France* *David Lewis, Managing Director, Kroll, France*
12.35	**Networking lunch**
13:50	**Specialist sessions**
	Option 1: Advising young wealth creators Technological advancements and changes to the way we work have driven a surge in new, young entrepreneurs in recent years. From influencers to AI app developers, opportunity abounds for the young and digitally savvy to create enormous wealth in a short space of time. These young wealth creators need help to understand how to manage their sudden change in circumstances. Our panel will delve into the challenges advisors of young wealth creators face. *Moderator: Nicole Cavanagh TEP, Senior Associate, MJM Limited, Bermuda* *Gretel Ciniglio de Pérez, Senior Partner, Fabrega Molino, Panama* *Carlo Salvato, Professor, Bocconi University, Italy*
	Option 2: Trusts and values-based investment decisions – balancing financial return and broader impact This session will look at the tension between ethical investing and maximising investment returns – what does it mean for trustees globally? Can trust legislation be reformed to provide greater certainty to trustees? *Moderator: Gina Pereira TEP, Founder, Dāna Stewardship Advisory, Bermuda* *Chris Moorcroft TEP, Partner, Harbottle & Lewis LLP, UK* *Joanne Morse TEP, Deputy CEO, Summit Trust International SA, Switzerland* *Adrian Pilcher TEP, Partner, ISOLAS LLP, Gibraltar* *Kindly sponsored by Rawlinson & Hunter*
	Option 3: Unhappy modern families: Failing to plan Our panel will discuss a case study of a complex, multi-jurisdictional modern family, exploring the status of children and whether or not they are entitled to inherit. *Moderator: Julie Man TEP, Partner, Russell-Cooke LLP, UK*

	Alvaro Aznar Azcarate TEP, Partner & Head of International, Buckles, UK *Cindy Brittain TEP, Partner, Holland & Knight LLP, US* *Dr. Dhruv Janssen-Sanghavi, Founder, Janssen-Sanghavi & Associates – International Tax Counsel, Netherlands* *Andrew Powell, Barrister, 4PB, UK*
14.35	**Change rooms for next specialist sessions**
14.40	**Specialist sessions repeated – options as listed above**
15.25	**Networking and refreshments**
15.55	**Mainstage Session 3: Capacity assessment? There's an app for that!** As AI increasingly becomes part of our professional and personal lives, we've all been thinking about how we can use AI tools and platforms to make us more efficient and effective, with all the risks and benefits this brings. Assessing clients' capacity is crucial to so much of what we do. How can AI help us to determine a client's capacity? What are the risks associated with this and do they outweigh the benefits? *Moderator: Tim Farmer, Managing Director, Tim Farmer Ltd, UK* *Sandra Challma, Chief Executive Officer, Cognes Medical Solutions, Sweden* *Professor Chiara Favilli, Associate Professor, Lawyer, University of Pisa, Italy* *Leah Sewell TEP, Barrister, Chalfont Chambers, Australia* *Dr. Kenneth Shulman, Professor of Psychiatry, Faculty of Medicine, University of Toronto, Canada*
16.50	**Mainstage Session 4: Is a global wealth tax the answer to widening inequality?** Calls for wealth taxes on the world's super rich as a means to tackle inequality are gaining momentum – with the Brazilian proposal to introduce a global wealth tax at the G20 and US President Biden's promise to impose a billionaire tax if re-elected. But is this the panacea it is claimed to be? Is a global wealth tax workable? Our panellists debate the pros and cons. *Moderator: Xavier Isaac TEP, Accuro Trust (Switzerland) SA, Switzerland* *Arun Advani, Professor, Centre for the Analysis of Taxation, UK* *Emma Chamberlain CTA TEP OBE, Barrister, Pump Court Tax Chambers, UK* *Ronald E Evans TEP, Managing Partner, BakerMcKenzie, Venezuela*
17.35	**Closing address** *Pamela Cross TEP, STEP Board Member; Global Congress Programme Chair; Partner, Borden Ladner Gervais LLP, Canada*
17:40	**Day 1 close**
19.00	**Reception and dinner** Villa Miani

DAY 2: 26 FEBRUARY 2025 *Chair: Giovanni Cristofaro TEP, Global Congress Programme Member; Chiomenti Studio Legale, Italy*	
08.00	**Registration and refreshments** Exhibits open
09.00	**Welcome from Chair** *Giovanni Cristofaro TEP, Global Congress Programme Member; Chiomenti Studio Legale, Italy*
09.10	**Keynote Address 3: Global geopolitics: trends and implications** A geopolitical expert will discuss the current trends in population movements and associated capital flows in light of recent world events. What does this mean for advisors to high-net-worth individuals? *Merriden Varrall, Partner, Australia Geopolitics Lead, KPMG Australia, Australia*
09.40	**Mainstage Session 5: Global approaches to protect vulnerable clients – pipe dream or achievable reality?** What is being done to harmonise laws and systems to better protect vulnerable persons in a cross-border context? What are the challenges to achieving global approaches and how can these be tackled? *Moderator: Alice Martin, Partner, Charles Russell Speechlys, Switzerland* *Shanti Abraham, Founder/Lawyer, Shanti Abraham & Associates, Malaysia* *Philippe Lortie, First Secretary, Hague Conference on Private International Law (HCCH), Netherlands* *Lenka Vysoka, Legal and Policy Officer, European Commission, Belgium*
10.30	**Networking and refreshments**
11.00	**Mainstage Session 6: Enabling next-gen legacies: Managing emotions in business transition** How do the next and the senior generation members organise and experience transitions in the family's businesses? How do both generations view and manage emotions in these processes? What are their key takeaways? *Moderator: Peter Jaskiewicz, Academic Director of the Family Enterprise Legacy Institute (FELI), Patricia Saputo Distinguished Chair in Family Enterprise, Telfer School of Management, University of Ottawa, Canada* *Philip Aminoff, Chairman, Helvar Merca Oy Ab, Finland* *Robert Schulman, Chairman, MinersLoop Oy, Finland*
11.55	**Mainstage Session 7: The rise and fall of crypto?** We had this extraordinary moment around 2021 where government COVID relief money turbocharged the crypto economy and then we have this present moment where the physical world has taken precedence, most clearly in the armed conflicts underway. In the shadow of this, we had SBF and FTX rocket to extraordinary heights on the promise of crypto and then collapse for the oldest reasons of all, simple fraud. Ultimately, the basics of planning are still as important as ever. An expert panel debates the risks and certainties of crypto in today's world. *Lya Glaentzlin D'Ascoli TEP, Foreign Investments Attorney expert in Digital Assets and Web3, CLA Consultores SAS, Colombia* *Racheal Muldoon, Partner, Charles Russell Speechlys, UK*

	Demetre Vasilounis TEP, Partner, Aird & Berlis LLP, Canada
12.40	**Networking lunch**
13.55	**Specialist sessions**
	Option 1: Modern families: Provision for polygamous partners, and precedents on parentage Modern family dynamics are creating new precedents. This session looks at some recent cases involving polygamous partners and the conflicts that can arise when cultures clash. *Moderator: Hannah Mantle TEP, Partner, Forsters LLP, UK* *Vicki Ammundsen TEP, Director, Vicki Ammundsen Trust Law Limited, New Zealand* *Esmond Brown TEP, Counsel, Appleby, Cayman Islands* *Nigel Kat, S.C., Senior Counsel, Parkside Chambers, Hong Kong*
	Option 2: Recognising and tackling vulnerable client abuse As populations globally are getting older, incidences of vulnerable client financial abuse are sadly on the rise. Our panel considers recent vulnerable client abuse cases and what lessons practitioners can take from these to help tackle abuse and protect clients. *Hon. Justice Asif KC, Grand Court Judge, Grand Court of the Cayman Islands, Cayman Islands* *Holly Cunliffe TEP, Partner, Aird & Berlis LLP, Canada* *Ben Havard TEP, Partner, Collas Crill, Guernsey*
	Option 3: (Philanthropy) Impact for the Next Generation: Navigating the spectrum of Capital There is a knowledge gulf in the private client sector around philanthropy and impact, which is preventing advisors from engaging their clients on these topics despite a clear and growing demand for these services. As a result, clients are missing out on products, services and advice that would allow them to meet their ambitions of having a positive impact with their wealth. We will share practical examples on how some innovative organisations are integrating non-financial outcomes into their products and services and how these can be leveraged to create impact and meet clients' deeper goals. *Giulia Cipollini TEP, Senior Partner, Head of Private Clients and Tax Italy, Withers, Italy* *Sianne Haldane TEP, Founder, Boon Impact, UK* *Assaf Hasson, Founder, Hasson & Co. | Private Wealth, Israel* *Milton D. Speid, Executive Director, VC Include, US*
14.40	**Change rooms for next specialist sessions**
14.45	**Specialist sessions repeated – options as listed above**
15.30	**Networking and refreshments**

16.00	**Mainstage Session 8: Leaders' insight panel** A panel of leaders answer questions on the future of the industry: what do they think will be the biggest challenges? What skills do they believe are needed to tackle these? What advice would they give to those following in their footsteps? *Interviewer: Abbie Wright TEP, Assistant Manager, Entrust, Jersey* *Henry Lam TEP, Managing Director, HSBC, Hong Kong* *Greg Limb, Partner, Global Head of Family Office and Private Client, KPMG, UK* *Natacha Onawelho-Loren, Managing Director, Accuro Trust (Switzerland) SA, Switzerland* *Ingrid Pierce, Global Managing Partner, Walkers, Cayman Islands*
16.50	**Final remarks** *Giovanni Cristofaro TEP, Global Congress Programme Member; Chiomenti Studio Legale, Italy* *Kelly Greig TEP, Chair of STEP*
17.00	**Close of Conference**