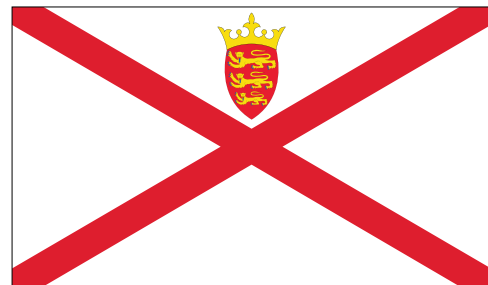


# International Trusts & Private Client Forum JERSEY



## Tried & tested, the role of the trustee in modern times



Featuring  
25+ Speakers at  
the largest trust event  
in Jersey

### Top reasons for you to attend

In-depth analysis of the Jersey's key opportunities & challenges including:

- When Personal Liability Looms
- The Extent to which the Trustee can be Protected
- Trust disputes
- The Drive for Transparency and Disclosure
- The Attitude of the Matrimonial Courts to the Trust
- Destruction of the Government of India Principle



Naomi Rive, Chief Trust Officer, **COUTTS & CO TRUSTEES (JERSEY)**



Jonathan Speck Partner **MOURANT OZANNES**



Dominic Dowley QC Barrister **SERLE COURT**



Tony Pitcher Director **LGL TRUSTEES**



Alan Binington Private Client Director **RBC TRUST COMPANY**



Ed Devenport Partner **MOURANT OZANNES**

Lead Partner:



Bronze Partner:



Thought Leader:



23rd April 2015  
L'Horizon Hotel,  
Jersey

8.30 Registration &amp; Coffee

9.30 **Chairman's Opening Remarks**

**Alan Binnington**  
Private Client Director  
**RBC TRUST COMPANY**

9.40 **Keynote Address**

**Michael Birt**  
Bailiff  
**STATES OF JERSEY\***

10.20 **PANEL DISCUSSION**

### When Personal Liability Looms Has the Role of the Trustee Simply Become too High Risk?

*Trustees face an ever more complex world where communications are instantaneous and beneficiaries, settlors and protectors expect ever quicker decision making; where investment structures are often complex, multi-layered and multi-jurisdictional and where other office holders either expect or are entitled to participate in administrative and dispositive decision-making. This session will cover:*

- To what risks do such factors increasingly give rise for trustees?
- What strategies can trustees deploy to mitigate them?



**Bruce Lincoln**  
Partner  
**MOURANT  
OZANNES**

Trustee



**Tony Pitcher**  
Director  
**LGL TRUSTEES**

Legal advisor



**Giles Richardson**  
Barrister  
**SERLE COURT**

11.10 Refreshment Break

11.30 **PANEL DISCUSSION**

### The Extent to which the Trustee can be Protected

*Our discussion is likely to cover common obstacles and issues arising in protecting the trustee:*

- Negotiating indemnities
- Letters of wishes
- Any protection for the trustee?
- The circumstances in which it is justifiable to seek the assistance of the court

- Nature of the protection which can be obtained there



**Morven McMillan**  
Partner  
**MOURANT  
OZANNES**



**Sally Edwards**  
Partner  
**OGIER**



**Nicolas Le  
Poidevin QC**  
Barrister  
**NEW SQUARE  
CHAMBERS**



**Naomi Rive**  
Chief Trust Officer  
**COUTTS & CO  
TRUSTEES  
(JERSEY)  
LIMITED**

12.20 **IN DEPTH LECTURE**

### The Arbitration of Trust Disputes: Just do it!

*The arbitration of trust disputes has been under discussion for years, but arbitration has never been embraced by practitioners as a means of resolving trust disputes:*

- Why is this?
- Is there something fundamental preventing trust arbitration?
- Do we need legislation? How successful is the trust arbitration legislation in the Bahamas and Guernsey?
- What risks do interested parties run if they just do it?



**Elsbeth Talbot-  
Rice QC**  
Barrister  
**XXIV OLD  
BUILDINGS**



**Andrew Holden**  
Barrister  
**XXIV OLD  
BUILDINGS**

1.10 Lunch

2.30 **PANEL DISCUSSION**

### The Drive for Transparency & Disclosure: Is there a Trustee Duty of Confidentiality and What are the Boundaries?



**Jonathan Speck**  
Partner  
**MOURANT  
OZANNES**



**Dominic Dowley  
QC**  
Barrister  
**SERLE COURT**



**Ceris Gardner**  
Partner  
**MAURICE TURNOR  
GARDNER**



**Nick Holland**  
Partner  
**MCDERMOTT  
WILL & EMERY**

3.20 Refreshment Break

*"CONTENT VERY RELEVANT WITH ENGAGING SPEAKERS. GOOD CASE LAW EXAMPLES WITH PRACTICAL LESSON FOR TRUSTEES"*

First Names Group

3.40

PANEL DISCUSSION

## The Attitude of the Matrimonial Courts to the Trust



**Mark Temple**  
Partner  
**MOURANT OZANNES**



**Mark Harper**  
Partner  
**HUGHES FOWLER CARRUTHERS**



**Jonathan Burt**  
Partner  
**HARCUS SINCLAIR**

4.30

PANEL DISCUSSION

## Destruction of the Government of India Principle: Pressure upon Trustees to Pay and Display

*How should trustees properly respond to tax claims or requests for tax information? The panel will consider the changing landscape in relation to the cross border enforcement of revenue claims and an analysis of the implications of this for the trustee. In doing so they will address questions such as:*

- How has the Government of India principle been eroded over recent years?
- How should conflicts with beneficiaries in relation to provision of tax information and the payment of taxes be approached?
- What happens if the personal interests or reputation of the trustee or its directors are at stake?
- Can it be a breach of trust to leave trust assets in jurisdictions where tax claims can be enforced?
- In what circumstances might an application to the court be justified?



**Ed Devenport**  
Partner  
**MOURANT OZANNES**



**Richard Wilson**  
Barrister  
**3 STONE BUILDINGS**



**Lesley Lintott**  
Partner  
**PENNINGTONS MANCHES**

5.20

## Chairman's Closing Remarks

5.30

Close of Conference

5.35

## Champagne and Canapes Reception

8.00

Close of Drinks Reception

*\*Speaker under invitation*

## Lead Partner:

### MOURANT OZANNES

Mourant Ozannes' ground-breaking International Trusts & Private Client practice (ITPC) is led from London and brings together some of the most highly regarded international private client advisers, litigators and draftsmen to create an integrated global offering with the overriding aim of delivering exceptional client service. The integrated trusts and private client team cover both contentious and non-contentious matters in all its jurisdictions.

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As the **STEP Caribbean judges** commented:

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*'A remarkable line-up'*

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## Thought Leader



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# International Trusts & Private Client Forum Jersey

23rd April 2015 • L'Horizon Hotel, Jersey

FKW52859

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## WHEN AND WHERE

FKW52859

23rd April 2015

### Venue:

L'Horizon Hotel  
La Route de la Baie  
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