

Tuesday, 6 September 2016

Workshop at Baker & McKenzie, Holbeinstrasse 30, CH-8034 Zürich

Advanced CRS Workshop for Trustees and Family Offices

Trainers: Stephanie Jarrett, Lyubomir Georgiev, Elliott Murray and Gregory Walsh

Baker & McKenzie invites you to attend an advanced training programme on Tuesday 6 September 2016 on the obligations, requirements, and opportunities arising out of the Common Reporting Standard (CRS) for family offices, trustees, and similar corporate intermediaries in Switzerland. This Workshop builds on the Workshop you will likely have attended at the beginning of the year in Geneva or Zürich.

It is important for Swiss family offices, trustees, and similar corporate intermediaries to understand fully the obligations and requirements imposed on them by CRS and the impact this will have on their future policies and procedures, as well as on their clients.

This workshop is designed to give firms advising or serving high net worth clients and their families the skills necessary to ensure that the various requirements of CRS are successfully and practically implemented. In addition, we will also focus on the implications of CRS on more complex, advanced, or sensitive planning structures and assets.

Programme

Hour	Session
12:00 - 12:45	Registration and light lunch
12:45 - 13:15	Introduction and update on the status of CRS in Switzerland and abroad
13:15 - 14:00	Review and discussion of the obligations, requirements, and implications of the Swiss implementation of CRS for Swiss trustees and family offices, and similar corporate intermediaries
14:00 - 14:15	<i>Refreshment break</i>
14:15 - 15:00	Getting ready for CRS: an interactive look at the Swiss multi-family office
15:00 – 15:45	Analysis of key and important OECD and Swiss terminology that will impact typical clients of trustees, family offices, and similar corporate intermediaries
15:45 - 16:00	<i>Refreshment break</i>
16:00 - 17:20	Case studies to be worked in groups and discussed to clarify and highlight focal points from earlier topics. The emphasis will be on drawing out certain issues, discrepancies, and imprecisions presented by complex and sophisticated client structures managed by trustees, and single and multi-family offices
17:20-17:30	Conclusion