

STEP ASIA CONFERENCE  
9-10 NOVEMBER 2010  
JW MARRIOTT HOTEL  
PACIFIC PLACE  
HONG KONG

# TAX & TRUSTS IN ASIA

## BACK TO OUR FUTURE

### Conference Programme Focus

Conference language: English

- The effect of IFC's on Developing Nations
- Planning for PRC and Indian Clients
- The Paradox of Privacy – What “rights” exist to privacy of financial information and what is their source and their future?
- Legal Professional Privilege/Banking Secrecy and Implications Under AML and MLAT Rules and Exchange of Information Agreements
- Cross-Border Succession Issues
- Tax Information Exchange – Where are we now and what's next?
- Succession and Governance Issues

#### Delegate fee:

STEP Members:	GBP£750	HK\$9,500	US\$1,250
STEP Non-Members:	GBP£850	HK\$11,000	US\$1,400

#### Plus...

Afternoon sessions providing in-depth country updates

Afternoon sessions for speciality topics from family law issues to post-grantor trust planning

#### Keynote Speakers

*Professor K C Chan*

**Hong Kong Secretary for Financial Services & The Treasury**

*Michael Mansfield Q.C., London*

**The Paradox of Privacy**

Accredited for 11.5 hrs CPD  
Law Society, STEP, Bar Council, ILEX,  
The Law Society of Hong Kong

#### Conference partners

Gold:

Day 1

**Guernsey**  
International Finance Centre

Day 2



Silver:



Bronze:



Official International  
Business Newspaper



Official Media Partners





# Tax and Trusts in Asia – Back to Our Future

## Introduction

STEP Hong Kong is very pleased to be hosting this year's STEP Asia Conference. We have designed an exciting programme that recognizes not only the global interest in Asia but also Asia's growing interest in the world. A number of the conference's events are specifically Asian focused including in-depth sessions on planning issues for clients from the PRC, India and Taiwan. For practitioners interested in Asia these are vital sessions: Asia's mix of legal systems and its tax and regulatory regimes make it a challenging environment in which to operate.

Globalization has brought Asia increasingly into the heart of the Pacific Rim. Recognising the strong Asian links with North America, there are sessions on Canadian tax issues and on US tax developments. Australasian connections run strong in Asia and New Zealand and Australia sessions will be of significant interest. The update on UK tax issues should also be interesting given the radical impact that the Finance Acts 2006 and 2008 and the 2010 'Emergency Budget' have had on the UK fiscal landscape.

The conference will feature a number of cross-border sessions of global interest. These include a review of recent trust cases and updates on tax information exchange, double tax agreements and anti-money laundering rules. There will also be applied tax sessions including an analysis of an actual piece of post-grantor trust planning. As well as 'pure' tax and trusts events, wider practice areas will be discussed with, for example, talks about the practical aspects of holding family businesses, a case study on the issues in relation to meetings with settlors and family meetings following the death of a principal, and a discussion of practical aspects of trust administration.

The format of this year's conference will differ from that of previous years, in that the afternoon sessions will consist of six smaller presentations from which delegates will choose one, with the six topics being repeated twice. The smaller afternoon groups will allow for more in-depth treatment of the various topics and will permit some group discussion. The available places in each of the afternoon groups will be limited, and we encourage you to sign up quickly for the conference to ensure that you are able to attend the afternoon sessions that most interest you.

STEP Hong Kong looks forward to seeing you in November.

**Mary Ellen Hutton**  
**Chairman**  
**STEP Hong Kong Branch**

## Conference Partners

Gold:

Day 1



Day 2



Silver:



Bronze:



First there must be trust

Official International Business Newspaper



Official Media Partners



Delegate bag



Memory stick



Social programme



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First there must be trust

Exhibitors



For further information contact Laura Callicott on +44 (0)1423 851157 or email [Laura.Callicott@barkerbrooks.co.uk](mailto:Laura.Callicott@barkerbrooks.co.uk)

For ease register online at [www.step.org/asia 2010](http://www.step.org/asia 2010)

## MONDAY 8 NOVEMBER 2010

**6.00 - 8.00pm** **Welcome Cocktail Reception**  
The Lounge, JW Marriott Hotel, Pacific Place  
**Kindly sponsored by Azure Tax**

**8.00pm** **Speaker's Dinner**  
The Fish Bar, JW Marriott Hotel, Pacific Place  
**Kindly sponsored by Jersey Finance**

## DAY 1: TUESDAY 9 NOVEMBER 2010

### CURRENT ISSUES, PRACTICE & THEORY CHAIR: NICK JACOB, DEPUTY CHAIRMAN, STEP WORLDWIDE

**8.00am** **Continental breakfast and registration**  
(50 mins) Exhibits open

**8.50am** **Welcome from STEP Hong Kong**  
(5 mins) Mimi Hutton TEP, Chair, STEP Hong Kong Branch

**8.55am** **Welcome from STEP Worldwide**  
(5 mins) Nick Jacob TEP, Deputy Chairman, STEP Worldwide

**9.00am** **G20 and International Financial Centres**  
(45 mins) Richard Hay TEP, Stikeman Elliott, UK

- G20's transparency program has led to more TIEA's and DTA's being signed in the last year than the previous decade. What does this mean for you and your clients?
- Automatic or spontaneous exchange of tax information looms large in the plans of the large developed economies. How likely is it that automatic exchange will replace exchange on request and how would this change affect our industry?
- What G20 needs to know about international financial centres

**Kindly sponsored by Southpac Group**

**9.45am** **Legal professional privilege / banking secrecy and implications under AML and MLAT rules and exchange of information agreements**  
(45 mins)

John Hart TEP, J W Hart Ltd, New Zealand  
Craig Murphy TEP, Amicorp Hong Kong Limited, HK

- Where does legal professional privilege now stand in the light of the new standards for tax information exchange, recent AML laws and modern mutual legal assistance treaties?
- What are the practical implications for lawyers and their clients?

**Kindly sponsored by Global Pensions Group**

**10.30am** **Networking and Refreshments**  
(30 mins)

**11.00am** **Trust Law Update – update on recent cases**  
(30 mins) Richard Pease TEP, Lenz & Staehelin, Geneva, Switzerland

- Recent landmark trust cases from around the world and what they mean for the administration of trusts

**Kindly sponsored by Labuan IBFC**

**11.30am** **Planning for PRC and India – inbound and outbound issues**  
(1 hr)

Moderator – John Riches TEP, Chairman, Public Policy Committee, STEP Worldwide

#### PRC

Yongjun Peter Ni, White & Case, Shanghai, China

#### India

Cyril Shroff, Amarchand & Mangaldas & Suresh A Shroff & Co, Mumbai, India

- Changes abound in the attitudes of the two growth engines of the world – the PRC and India - in how they tax their taxpayers on foreign investment and trade and how they tax foreign investors on inbound investments. Speakers examine the main changes and what is necessary to adjust to the new landscapes.

**Kindly sponsored by Offshore Incorporations Group**

**12.30pm** **KEYNOTE ADDRESS**  
(30 mins)

Professor K C Chan

**Hong Kong Secretary for Financial Services & The Treasury**

**1.00pm** **Lunch**  
(1hr) **Kindly sponsored by Guernsey**

**2.00pm** **Afternoon sessions – in-depth country updates**  
(45 mins) **(Choose 1 from 6 concurrent options as stated below)**

These sessions examine in detail recent developments in trust and tax law and practice in each jurisdiction and focus on the practical implications for you and your clients.

#### **Option 1 UK update**

Nick Jacob TEP, Lawrence Graham LLP, UK

#### **Option 2 US update**

James Tsang, Squire Sanders & Dempsey, HK

#### **Option 3 Canadian update**

Patrice Marceau TEP, DLA Piper, HK  
Steven Sieker TEP, Baker & McKenzie, HK

#### **Option 4 Australia / New Zealand update**

John Hart TEP, J W Hart Ltd, New Zealand  
David Russell QC, TEP, Wentworth Chambers, Sydney, Australia

#### **Option 5 Taiwan update**

Wellington Liu, Tsar & Tsai, Taiwan

#### **Option 6 PRC update – a more in-depth presentation following from the morning presentation**

Yongjun Peter Ni, White & Case, Shanghai, China

**Kindly sponsored by ILS Fiduciaries**

**2.45pm** **Change of room – Afternoon sessions repeated**  
(15 mins)

**3.00pm** **Afternoon sessions – in-depth country updates**  
(45 mins) **(Choose 1 from 6 concurrent options as stated below)**

These sessions examine in detail recent developments in trust and tax law and practice in each jurisdiction and focus on the practical implications for you and your clients.

#### **Option 1 UK update**

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#### **Option 6 PRC update – a more in-depth presentation following from the morning presentation**

Yongjun Peter Ni, White & Case, Shanghai, China

**Kindly sponsored by ILS Fiduciaries**

**3.45pm** **Networking and Refreshments**  
(30 mins)

**4.15pm** **Divorce and Trusts**  
(45 mins) Russell Coleman SC, Chairman, Hong Kong Bar Association

- Divorce court attitudes to trusts in general – the changing landscape
- When are trust assets a financial resource of a spouse?
- Court's powers to make orders with respect to trust assets
- How to protect trusts against attack in divorce cases

**5.00pm** **Day 1 Close**

**6.00pm** **Cocktail reception and gala dinner**  
The Square, 4/FL Exchange Square II, Central  
**Kindly sponsored by Business Bermuda**

## DAY 2: WEDNESDAY 10 NOVEMBER 2010

### CURRENT ISSUES, PRACTICE & THEORY CHAIRED – BILL AHERN TEP, FAMILY CAPITAL CONSERVATION, HK

**8.15am** **Continental breakfast**  
(45 mins) Exhibits open

**9.00am** **KEYNOTE ADDRESS – Kindly sponsored by Guernsey**  
(45 mins) **The Paradox of Privacy**

Michael Mansfield Q.C., London

- What "rights" exist to privacy of financial information and what is their source?
- What are the exceptions to these rights and who has the benefit of them?
- How meaningful are privacy "rights" in the internet age?

**9.45am** **Speaking from Experience**  
(30 mins) *Richard Pease TEP, Lenz & Staehelin, Geneva, Switzerland*  
*Mark Lea, Lea & White International Advisers Ltd, HK*

- Drawing on the vast experience of this panel of "senior" practitioners, this session transfers to you that body of experience in how best to avoid mistakes and fix them when they happen.

**10.15am** **Case study on cross-border succession issues**  
(45 mins)

*Nick Jacob TEP, Lawrence Graham LLP, UK*  
*Patrice Marceau TEP, DLA Piper, HK*  
*James Tsang, Squire Sanders & Dempsey, HK*  
*Yongjun Peter Ni, White & Case, Shanghai, China*  
*Bernard Rennell, HSBC Private Bank, HK*

- The best way to draw out practical issues and problems with cross-border estates is by example. Your panel uses a case study to highlight common complexities and provide simple solutions.

**Kindly sponsored by Butterfield Trust**

**11.00am** **Networking and Refreshments**  
(30 mins)

**11.30am** **Private Client Panel – in which actual clients tell us what they want**  
(45 mins)

*Moderated by - Bill Ahern TEP, Family Capital Conservation, HK*  
*Vicky Wong TEP, Goldman Sachs (Asia) Ltd, HK*  
*Bonny Landers, Sterling Private Management Ltd, HK*

- Our normal focus is on us and how we can satisfy our clients' expectations. In this session we hear from a panel of "buyers" of our services as to what they do and do not want from us.

**12.15pm** **STEP Education Update**  
(15 mins) *Rob Rowe, Central Law Training, UK, Singapore and Middle East*

**12.30pm** **Lunch**  
(1hr) **Kindly sponsored by ILS Fiduciaries**

**1.30pm** **Afternoon sessions – Speciality Topics**  
(45 mins) **(Choose 1 from 6 concurrent options as stated below)**

These sessions provide a detailed examination of specific topics.

**Option 1 Working through an actual post-grantor trust planning situation**

*Mimi Hutton TEP, Withers, HK*  
*Todd Beutler TEP, Withers, HK*

**Option 2 Holding Family Business – Practical Aspects**  
*Kenny Foo, JP Morgan, HK*

**Option 3 Singapore, Hong Kong and Labuan Trust Law updates**

*Angelo Venardos TEP, Heritage Fiduciary Services PTE Ltd, HK*  
*Mark Lea, Lea & White International Advisers Ltd, HK*

**Option 4 Case study – a meeting with the Settlor, and a meeting with the family after the Settlor dies**

*Thelma Kwan, TEP, Barclays Wealth, HK*  
*Vicky Wong, TEP, Goldman Sachs (Asia) LLC, HK*  
*Christian Stewart, TEP, Family Legacy Asia (HK) Ltd*

The panelists will share their broad range of experience in dealing with trust beneficiaries after the Settlor's death, and they will discuss what could have been done differently during the Settlor's lifetime with the benefit of hindsight.

**Option 5 Presentation on Succession and Governance Issues – Working with the Unruly Family: Aligning Multiple Generations of a Family and their Advisors**  
*Dennis Jaffe, Professor of Organizational Systems and Psychology, Saybrook University, USA*

- Gaining family commitment to the work of governance
- How family dynamics and conflict influence multi-generational family enterprises
- Developing human, family and social capital
- Developing governance structures – Family Assembly, Council, Boards and Constitution

**Option 6 Practical trust administration case studies**  
*Jonathan Hubbard TEP, KCS Services Ltd, HK*  
*Miles Le Cornu, BNP Paribas Jersey Trust Corporation Limited, Jersey, Channel Islands*

- How to use external suppliers/advisors
- Obtaining tax advice for beneficiaries
- Monitoring investment performance
- Evidencing trustee decisions
- Provision of information to beneficiaries
- Stock exchange reporting

**2.15pm** **Change of room – Afternoon sessions repeated**  
(10 mins)

**2.25pm** **Afternoon sessions – Speciality Topics**  
(45 mins) **(Choose 1 from 6 concurrent options as stated below)**

These sessions provide a detailed examination of specific topics.

**Option 1 Working through an actual post-grantor trust planning situation**

*Mimi Hutton TEP, Withers, HK* *Todd Beutler TEP, Withers, HK*

**Option 2 Holding Family Business – Practical Aspects**  
*Kenny Foo, JP Morgan, HK*

**Option 3 Singapore, Hong Kong and Labuan Trust Law updates**

*Angelo Venardos TEP, Heritage Fiduciary Services PTE Ltd, HK*  
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- Obtaining tax advice for beneficiaries
- Monitoring investment performance
- Evidencing trustee decisions
- Provision of information to beneficiaries
- Stock exchange reporting

**3.10pm** **Networking and Refreshments**  
(30 mins)

**3.40pm** **The Effect of IFC's on Developing Nations**  
(40 mins) *Professor Jason Sharman, Centre for Governance & Public Policy, Griffith University, Queensland, Australia*

- Are IFC's a force for good or evil?
- What you should know about Professor Sharman's research paper into this controversial issue and what his conclusions might mean for the future of the jurisdictions in which you operate.

**4.20pm** **Debate. Thesis – Secrecy is dead, and so is confidentiality**  
(40 mins)

*Michael Mansfield QC, UK*  
*Richard Hay TEP, Stikeman Elliott, UK*  
*John Hart TEP, J W Hart Ltd, New Zealand*  
*Bill Ahern TEP, Family Capital Conservation, HK*

FOR: *Richard Hay, Bill Ahern*  
AGAINST: *Michael Mansfield, John Hart*

**5.00pm** **Conference Close – Mimi Hutton TEP, Chair, STEP HK Branch**

**6.30pm** **Farewell cocktails and dinner**  
*Watermark, Central Ferry Pier No. 7, Central*

# Tax and Trusts in Asia – Back to Our Future

## Delegate Registration Form. Fax: +44 (0)1423 85 11 51

Title: \_\_\_\_\_ First Name: \_\_\_\_\_

Surname: \_\_\_\_\_

Preferred name on badge: \_\_\_\_\_

Firm: \_\_\_\_\_

Position: \_\_\_\_\_

Postal Address: \_\_\_\_\_

Tel No: \_\_\_\_\_

Fax No: \_\_\_\_\_

Email: \_\_\_\_\_

Access/Dietary Requirements: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

PLEASE NOTE: We may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event

### Afternoon Sessions

Please indicate your preferred session for Day 1 at 2.00pm and again at 3.00pm and also Day 2 at 1.45pm and again at 2.45pm

Tuesday	2:00pm	3:00pm
<b>Option 1</b> UK update	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 2</b> US update	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 3</b> Canadian update	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 4</b> Australia / New Zealand update	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 5</b> Taiwan update	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 6</b> PRC update – a more in-depth presentation following from morning presentation	<input type="checkbox"/>	<input type="checkbox"/>

Wednesday	1:45pm	2:45pm
<b>Option 1</b> Working through an actual post-grantor trust planning situation	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 2</b> Holding Family Business – Practical Aspects	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 3</b> Singapore, Hong Kong and Labuan Trust Law updates	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 4</b> Case study – a meeting with the Settlor, and a meeting with the family after the Settlor dies	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 5</b> Presentation on Succession and Governance Issues	<input type="checkbox"/>	<input type="checkbox"/>
<b>Option 6</b> Practical trust administration case studies	<input type="checkbox"/>	<input type="checkbox"/>

### REGISTRATION FEE – please tick corresponding box

**STEP Members** 2 day conference and social functions

Fee

GBP £750  HK \$9,500  US \$1,250

STEP Members No: \_\_\_\_\_

**Non STEP Members** 2 day conference and social functions

Fee

GBP £850  HK \$11,000  US \$1,400

### How did you hear about the conference:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> STEP Website     | <input type="checkbox"/> Australasian Legal Business | <input type="checkbox"/> Banking Today         |
| <input type="checkbox"/> STEP Journal     | <input type="checkbox"/> Hong Kong Lawyer            | <input type="checkbox"/> Singapore Law Gazette |
| <input type="checkbox"/> Hong Kong Branch | <input type="checkbox"/> Financial Times             | <input type="checkbox"/> ACCA Focus            |
| <input type="checkbox"/> Singapore Branch | <input type="checkbox"/> Asia Legal Business         | <input type="checkbox"/> STEP Email            |

Other publications (please specify): \_\_\_\_\_ Other email/web (please specify): \_\_\_\_\_

### Social Functions

Please note the following social functions are included in the delegate rate. Please specify which you wish to attend:

- 8 November** – Pre-Conference Drinks Reception at The Lounge (Level 4), JW Marriott Hotel, Pacific Place
- 9 November** – Drinks & Dinner at The Square, 4/FL Exchange Square II, Central
- 10 November** – Drinks & Dinner at Watermark, Central Ferry Pier No. 7, Central

Further details will be supplied in due course. Please contact Laura Callicott on +44 (0)1423 85 11 57 or email [Laura.Callicott@barkerbrooks.co.uk](mailto:Laura.Callicott@barkerbrooks.co.uk), if you would like to bring a guest to either of the above dinners.

**Ticket prices for dinner guests not attending the conference as delegates**  
GBP£50 HK \$700 US \$85

### Payments

For secure online payments please go to our website [www.step.org/conferences](http://www.step.org/conferences) Credit cards – we accept Visa, Mastercard, Switch/Maestro\*

Name on card: \_\_\_\_\_

Card type: \_\_\_\_\_

Credit card No: \_\_\_\_\_

Card start date:  Expiry date:

Signature of card holder: \_\_\_\_\_ Date: \_\_\_\_\_

\*All credit cards will be debited in pounds sterling at the rate of exchange used by your credit card provider. For payment queries please email [debbie.paggett@step.org](mailto:debbie.paggett@step.org)

### Hotel Accommodation

Preferential rates have been negotiated with the JW Marriott Hotel. To book your room please visit [www.step.org/asia2010](http://www.step.org/asia2010) and click on the venue tab.

### Cancellations/Substitutions

Cancellations must be received in writing at least seven days before the date of the conference and will be subject to an administration charge of GBP £50 (HK\$ 700, US \$85). It is regretted that cancellations made after this time will not be accepted and the delegate will be liable for the full conference fee. Substitutions may be made at the time provided the organisers are notified prior to the conference.

Please note that if a non-STEP member attends in lieu of a STEP member the difference in fees will be charged.

### Terms and Conditions

Conference documentation will be distributed at the event. STEP reserves the right to amend or cancel this conference where the occasion necessitates. In such circumstances a full refund of any registration fee will be made but STEP shall accept no further liability. Prices may be subject to change. This booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of the fees due. [The conference language is English.](#)

### Data Protection

The Society of Trust & Estate Practitioners will use this information to update its databases, which will be used to provide details of STEP products and services. Please tick the box if you would prefer the Society not to use your information in this way.  STEP may also contact you from time to time with details of programmes and events that may be of interest to you. Please tick the box if you would prefer the Society not to use your information in this way.

# Speakers Biographies

## STEP's conference, Tax and Trusts in Asia, brings together 30 top national and international speakers including:

### Professor K C Chan

Professor K. C. Chan was born in 1957. Before assuming the post of Secretary for Financial Services and the Treasury, Professor Chan was Dean of Business and Management of the Hong Kong University of Science and Technology (HKUST). Prior to joining the HKUST Business School in 1993, Professor Chan had spent nine years teaching at Ohio State University in the USA.

Professor Chan received his bachelor's degree in economics from Wesleyan University and both his M.B.A. and Ph.D. in finance from the University of Chicago. He is specialised in assets pricing, evaluation of trading strategies and market efficiency and has published numerous articles on these topics.

Before joining the Government, Professor Chan held a number of public service positions and is also former President of the Asian Finance Association and former President of Association of Asia Pacific Business Schools.

### Richard Hay TEP

Richard Hay is the co-chairman of the STEP International Committee and head of the Private Capital Group in the London office of Stikeman Elliott, Canadian and International lawyers. The Group advises on information exchange and financial regulation matters, including the initiatives pursued by the OECD, the EU, the FATF and the IMF. The Group also advises on international estate planning structures for high net worth families with cross-border affairs.

Prior to entering practice, Richard lectured on tax and securities law on the Faculties of Law at the National University of Singapore and the University of Ottawa in Canada. He also clerked for the Chief Justice of the Supreme Court of Ontario.

Richard received the STEP award in 2008 for "Outstanding Contribution to the Profession" for work related to tax information exchange and financial regulation.

### Michael Mansfield Q.C.

Michael Mansfield is a radical lawyer with an unparalleled commitment to his clients, driven by anger at injustice and hypocrisy. He has been tearing down the citadels of arcane legal conventions for over forty years. Unafraid of rejection or failure, he has taken on the most high profile, difficult and challenging cases of our times.

Some of his most controversial legal cases range from the Birmingham Six, the Bloody Sunday Inquiry, the Dodi Fayed/Diana inquest, Iraqi hi-jackers, Stephen Lawrence, the 'Ricin' trial, the Jean Charles de Menezes inquest and many more.

In his *Memoirs of a Radical Lawyer*, published by Bloomsbury last year, he dissects many of these cases revealing a meticulous approach to forensic science, cross examination techniques, the often complex political dimensions and his emotional reactions to his work – with clarity, subtlety and charm.

### Professor Dennis Jaffe

Dr. Jaffe is a professor of organisational systems and psychology at Saybrook University in San Francisco, and an advisor to families about family business, governance, wealth and philanthropy. He is author of the new book, *Stewardship in your Family Enterprise: Developing Responsible Family Leadership Across Generations*, co-author of *Working With the Ones You Love: Building a Successful Family Business*; *Working With Family Businesses: A Guide for Professional Advisors*, as well as management books *Rekindling Commitment*, *Getting Your Organization to Change* and *Take this Work and Love It*, and more than a hundred management articles.

In 2005 he was awarded the Beckhard Award for service to the field from the Family Firm Institute. He received his BA degree in Philosophy, MA in Management, and Ph.D. in sociology, all from Yale University, and is a licensed psychologist.

### Peter Ni

Yongjun Peter Ni is the head of White & Case's Greater China tax practice. He has more than 15 years of experience providing international tax services to foreign and Chinese MNCs. Before joining White & Case, he led the international tax practice of a global "Big 4" accounting firm in China. Peter has been ranked as a Leading Individual for China Tax by *International Tax Review*.

Peter's practice covers all tax aspects of cross-border investments and transactions. He also advises clients on the regulatory and legal aspects of doing business in China.

Peter is the co-author of *China Taxation – Law, Practice and Planning*, the most comprehensive English language treatise on Chinese tax law (published by Sweet & Maxwell). He frequently speaks at international conferences and has been invited by the Chinese tax authorities to advise on tax legislation and provide international tax training to Chinese tax officials.

### Professor Sharman

Jason Sharman is a Professor at Griffith University in Brisbane, Australia. Sharman's research is focused on the regulation of global finance, especially as it relates to money laundering, tax, corruption and international financial centres.

Jason has worked as a consultant with the World Bank, Asian Development Bank, Commonwealth Secretariat, Financial Action Task Force, the Asia-Pacific Group on Money Laundering, Pacific Islands Forum and in the private sector. He is currently working on his fifth book, investigating the effectiveness and diffusion of anti-money laundering policy.

Jason's work has been featured in major media outlets like the Economist and the New York Times, and has been taken as evidence by the United State Senate Homeland Security Committee.

### About the Organisers

The Society of Trust and Estate Practitioners (STEP) is a unique professional body providing members with a local, national and international learning and business network focusing on the responsible stewardship of assets today and across the generations.

STEP provides education, training, representation and networking for its members. Members advise clients on the broad business of the management of personal finance. Full members of STEP are the most experienced and senior practitioners in the field of trusts and estates. STEP has over 15,500 members worldwide, providing coverage of over 66 countries.

For further information, visit [www.step.org](http://www.step.org) or email [step@step.org](mailto:step@step.org)

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