SPEAKERS

William Ahern TEP, Family Capital Conservation, Hong Kong

William has over 20 years’ experience in Hong Kong and elsewhere in Asia in helping families deal with complex tax, succession and legacy issues.

William was admitted as a solicitor in Brisbane in 1980 and England, Wales and Hong Kong in 1988. He was the trust and tax partner at Hong Kong law firm, Deacons between 1990 and 1994. He lived and worked in Brisbane between 1994 and 1999 where he continued to represent Hong Kong families and law firms and a Jersey trust company specialising in cross-border tax and succession planning.

After returning to Hong Kong in 1999, William worked as a consultant to a private client specialist law firm, the Director of Trust and Legal Affairs of an international trust company, and between December 2002 and June 2008, as Managing Director of HSBC Private Bank’s strategic tax advisory arm.

William established Family Capital Conservation Limited (a Hong Kong Company) in June 2008 to focus on providing independent and strategic advice to families and intermediaries in complex tax, succession and legacy planning.

Jonathan Bailey TEP, Nerine Trust, BVI

Jonathan was born and educated in England and was admitted as a solicitor in England and Wales in 2003. He worked at Dickinson Dees LLP (now Bond Dickinson) in the UK on private client matters until he moved to the BVI in 2007.

In the BVI Jonathan was an associate solicitor at the law firm Harney, Westwood and Riegels for three years, he is a full member of the Society of Trust and Estate Practitioners (STEP) and was admitted as a solicitor in Anguilla and BVI. In 2009 Jonathan moved to a large trust company in the BVI as their in-house trust counsel.

Jonathan joined Nerine BVI in 2013 as the managing director, and has considerable experience advising clients in relation to the establishment of BVI trusts, the use of VISTA legislation, private trust companies and for general succession of BVI company shares. He is vice-chairman of STEP BVI and also sits on the trust law review committee. Jonathan spends a large amount of time travelling to meet with clients and intermediaries in Asia, Europe and North America. He has spoken at STEP events and presented to various organisations around the world on BVI matters.
Todd Beutler TEP, BMT International, Hong Kong

With over 19 years of experience at some of the world’s top law firms, Todd focuses his practice on tax and trust law, business succession and fiduciary matters, and general counsel advice. Todd advises high net worth individuals and families, their family controlled businesses and funds, as well as their foundations, trusts and family offices on a wide variety of tax, business and private client matters. Todd regularly represents private banks and financial institutions, multi-family offices and other financial advisors. He also advises tax exempt organisations on charity matters and assists private clients with their philanthropic aims. In addition to counselling and planning, he regularly represents clients in tax controversy matters and fiduciary litigation.

Samantha Bradley TEP, Sir Elly Kadoorie & Sons Ltd, Hong Kong

Samantha Bradley is English and Hong Kong qualified solicitor and former branch chair of STEP Hong Kong 2013-2015. Her experience in the wealth management sector began in Allen & Overy’s private client department in 1995. She moved to a family office as lead lawyer in 2002 before joining Withers where she became a partner in its wealth planning department in 2005. Samantha helped launch Withers’ first Asian office in Hong Kong in 2008 and was its first office managing director and regional head of wealth planning for Asia. She is currently head of legal and trust management in a mature Hong Kong based single family office.

Michael Butler, Finlaysons, Australia

Michael Butler is the partner in charge of the Finlaysons Tax & Revenue Group in Adelaide and Darwin, Australia.

Michael advises domestic and foreign clients extensively on federal, international and state tax matters; including income tax, capital gains tax, goods and services tax (GST), wine equalisation tax (WET), land tax, stamp duty and payroll tax.

Michael worked for a number of years in the Tax Departments of law firms in London, New York and Sydney before returning to Adelaide to establish the Finlaysons Tax & Revenue Group in 2001.

Michael has a special interest in estate and business succession planning, international tax matters (including transfer pricing and cross-border financing), mining, property and wine taxation.

David Chang, CEO, Sankeel Family Office, PRC

SANKEEL Family Office, CEO Shanghai, China, 2016.2 – present

- Managing and building out SANKEEL FO from successful family investment office into fully functional multi family office serving UHNW families with particular focus on Fujian business community

Prosperity Multi Family Office, CEO Guangzhou, China, 2016.2 – present
- Managing and building out PROSPERITY MFO from successful PE/VC investment office into fully functional multi family office serving UHNW families with particular focus on southern part of China.

**G9 China Private Office, Managing Partner Shanghai, China, 2015.1 – present**

- Representing G9 Private Office (a global virtual family office network) in China by managing, facilitating and executing cross border family wealth investment, protection and succession for Chinese UHNW families.
- Providing G9’s global UHNW family clients with on-the-ground opportunities, intelligence and guidance in making financial and direct investment in China.

**China Family Office Association, Secretary General Shanghai, China, 2014.3 – present**

- Bringing international standard of excellence in managing and operating family offices to meet Chinese UHNW families demands
- Providing timely and highly customized solutions to meet emerging and complex needs of Chinese UHNW families in cross-border direct investments, next generation successor training and global wealth allocation & protection.

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**Paul Christopher, Mourant Ozannes, Hong Kong**

Managing Partner at Mourant Ozannes based in Hong Kong, Paul specialises in corporate, banking and finance work. He regularly advises on the establishment and structuring (as well as restructuring) of offshore investment funds. He has an established trust practice and acts for a number of leading trust institutions.

Paul qualified as a Solicitor (England) in 1999 (currently non-practising), an Advocate (Guernsey) in 2003 and was admitted as a solicitor of the Eastern Caribbean Supreme Court in 2013.

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**Russell Clark TEP, Carey Olsen, Guernsey**

Russell heads up the trusts and private wealth department in Carey Olsen’s Guernsey office advising on both contentious and non-contentious trust matters. He specialises in the establishment of complex trust structures for businesses and private individuals. He regularly advises and lectures on compliance issues. Russell is a member of ACTAPS and chair of the technical sub-committee of the Guernsey branch of STEP.

He was part of the working party that led to the reform of the Guernsey trust law in 2007 and has been closely involved with the introduction of Guernsey’s foundations legislation.

Russell has been named as one of the world’s top 25 pre-eminent trusts and estates legal practitioners as part of the ‘Best of the Best’ Expert Guide each year since 2011.

Russell was elected into the Academy of International Estate and Trust Lawyers in 2014. Russell was admitted as a solicitor of the Supreme Court of England and Wales before returning to

Russell is also a member of Carey Olsen LLP which is the firm’s London office.

Gail E. Cohen TEP, Fiduciary Trust, US

Gail E. Cohen, Chair of Fiduciary Trust’s Board of Directors and General Trust Counsel, is responsible for overseeing Fiduciary Trust Company’s trust and estate services and client relationships. She has over 30 years of experience in the area of trusts and estates. Ms. Cohen is a member of the Management and Operating Committees, and is also Chair of Fiduciary Trust International of the South. She is Immediate Past Chair of the New York Bankers Association, and sits on its investment committee. She has previously served as that Association’s first woman Chair, and as Vice Chair, and Treasurer.

In 2010 and 2011, she was named one of the “Top 50 Women in Wealth,” selected by AdvisorOne. Ms. Cohen is a Fellow of the American College of Trust and Estate Counsel (ACTEC). She holds the Distinguished Accredited Estate Planner® designation, has been elected into the NAEP Estate Planning Hall of Fame, and has been honored by the Trusts and Estates Lawyers Division of the UJA. Ms. Cohen is a frequent writer and lecturer for attorney groups, including University of Miami’s Heckerling Institute (2014), as well as Practicing Law Institute to the New York State Bar Association and Society of Trust and Estate Practitioners. Before joining Fiduciary Trust in 1994, Ms. Cohen was a trusts and estates associate at the law firm of Debevoise & Plimpton. Previously, she was an associate at the law offices of Edward S. Schlesinger, P.C. She currently sits on the Investment Committee of the New York City Bar Association and is a former member of that Bar Association’s Committee on Estate and Gift Tax, which she chaired from 1998-2001.

Peter Cohen TEP, Trident Trust, US

Peter Cohen is a member of the Board of Directors and Chairman of Trident Trust Company (South Dakota) Inc. Services. He has been associated with the Trident Trust for over 30 years serving in various capacities. Peter is a graduate of Rhodes University, the University of Stellenbosch and the University of London. He also is a member of the American and International Bar Associations, the International Fiscal Association, the International Tax Planning Association, the Society of Trust and Estate Practitioners (STEP) and the Society of International Business Fellows (SIBF).

Peter has written and spoken frequently on topics associated with the international financial services industry.

Peter Cotorceanu TEP, G&TCA and Anafor, Switzerland

Peter Cotorceanu is CEO and Founder of G&TCA (GATCA & Trusts Compliance Associates LLC) and creator of www.gatcaandtrusts.com. G&TCA and www.gatcaandtrusts.com are devoted to helping the fiduciary industry implement
FATCA and CRS. Peter is also Of Counsel to the Zurich, Switzerland office of Anaford AG, a boutique law firm, where Peter specialises in FATCA and CRS compliance for the fiduciary industry and U.S.-related private-client matters.

Before returning to private practice in 2014, Peter was the Head of fiduciary products for UBS’s offshore trust companies. He was previously UBS’s Head of Wealth Structuring Consulting for UHNW clients in Zurich. While at UBS, Peter was responsible for implementing UBS’s FATCA compliance for trusts, foundations, and other fiduciary structures. Before joining UBS, Peter practiced law for over 20 years, both in Switzerland and the U.S., most recently at Baker & McKenzie Zurich.

Jonathon Clifton, Vistra, Hong Kong

Jonathon joined the Vistra Group in February 2010 as Executive Director for OIL Hong Kong and in 2012 was promoted to Managing Director, Asia with P&L responsibility for the region. In 2015, Jonathon was promoted to lead the three businesses of OIL, Novasage and Taka and is a member of the Vistra Group’s Global Executive Committee. He is responsible for the setting the strategy for the Group’s Company Formation Division and the combined financial performance of the three brands. He maintains and develops a number of senior level client relationships and speaks regularly at industry events on the key trends and developments within the broader offshore industry.

Jonathon has approximately 20 years of experience in a range of corporate strategy, consulting and strategic business development roles in a career that has taken him throughout Asia Pacific, including 4 years in Tokyo and 7 years in Hong Kong. Jonathon has worked across the financial & professional services industries and prior to joining the Group, worked at PwC for 7 years in a range of strategic business development, consulting and leadership roles and was responsible for the establishment of the Business Development Division for PwC Hong Kong and China.

Cynthia D’Anjou-Brown, HSBC Private Bank, Hong Kong

Cynthia D’Anjou-Brown has gained a wealth of experience working in the non-profit sector over the past 30 years. As a social worker in Canada she started her career as a counselor and later move into non-profit management and community development and planning. In Hong Kong she has specialised in consulting with respect to family philanthropy, non-profit management, and fund-raising, and has been extensively involved with family governance engagements.

Previously, Cynthia was a Vice-President at the United Way of Greater Toronto, the largest community funder of social services in the city. Before joining the United Way, she was the Executive Director of a municipal social planning organisation responsible for community needs assessments, coordination of NGOs, public policy analysis, and new service development.

Andrew De La Rosa, ICT Chambers, Cayman Islands

Andrew De La Rosa is an English barrister and Cayman Islands attorney. He acts as an advocate and adviser on matters concerning fiduciary relationships in the trust, estate, company, investment management and partnership spheres.
experience encompasses all of the principal English common law-based international financial centres including the established and emerging centres in Asia and the Middle East.

For a number of years Andrew has been ranked in professional guides as a leading specialist in his field. Professional clients have described him as “a great advocate and terrific strategist,” “awesome and absolutely compelling” and “charming and easygoing but with a deadly eye and known to get results.”

Andrew has been instructed as counsel in a number of the most significant international trust and succession disputes litigated in recent years and a series of international trust, estate and collective investment fund restructurings and disputes. He has also acted as a government consultant, was for seven years the Director of Studies of the annual Oxford Offshore Symposium at Jesus College, Oxford University and has taught at the Luxembourg School of Finance.

Nicolas Fu, Fu Tak Iam Foundation, Hong Kong

Nicolas is an alternative and traditional investment specialist with client relationship and financial analysis skills. He has broad experience in both asset and private wealth management. In his current role as Chief Investment Officer at Banbury Investments in Hong Kong Nicolas manages an investment portfolio for a large since family office with a global remit. Before joining Banbury Investments in 2015, Nicolas was Senior Portfolio Manager at HSBC Alternative Investments based in London where he managed the team responsible for private client discretionary and advisory hedge fund mandates in the UK.

Eugene Fung SC, Barrister, Temple Chambers, Hong Kong

Eugene Fung's practice comprises litigation and advisory work on commercial litigation (including civil fraud and asset tracing/recovery), trusts and probate litigation, tax litigation (relating to profits tax, salaries tax, stamp duty or estate duty for both the Revenue and taxpayers), property litigation, and company and insolvency litigation. He also regularly advises on non-contentious trusts, probate, charity and tax matters.

Yvette Fung, Chair, The Yeh Family Philanthropy

Yvette Yeh Fung is the chair of the Yeh Family Philanthropy and a director of Hsin Chong International Holdings Ltd.

Yvette became involved in education when her older daughter started school. That early involvement sowed the seeds for her passion and involvement in education, social entrepreneurship and philanthropy. She is a former Council member of the Hong Kong University of Science & Technology and current member of the Board of Visitors of Stanford Law School and the Executive Committee of the Bai Xian Asia Institute. She also serves on the boards of other Hong Kong non-profits. Yvette received her B.A. (Psychology) from
Katie Graves TEP, Withers, Hong Kong

Katie is a member of the International team of the Wealth Planning department and she joined the Hong Kong office in October 2010. She works with international families in relation to the establishment of complex trust structures, including Sharia compliant trusts. Katie has advised a number of international families in relation to the creation of family offices and continues to advise the families on all aspects of UK tax (where relevant) and fiduciary issues and coordinating foreign tax and other advice for the family office and family members.

Katie advises UK expatriates and Asian families with UK connections on their personal tax issues. Katie also advises trustees on a range of matters including the consequences of holding UK assets or having UK resident beneficiaries and the issues arising from the involvement of the trustees in commercial transactions.

‘...very proactive and efficient...’ Citywealth 2012
‘...extremely competent and technically precise in advice and her execution …’ Chambers Asia Pacific 2013

Itamar Har-Even, ION Pacific, Hong Kong

Co-Founder and current Co-CEO and Managing Director at Ion Pacific, Since Ion Pacific’s founding in early 2015, Itamar has worked with the team across the Hong Kong, London and San Francisco offices to build the firm very quickly into a
leading player across its key businesses. Before founding Ion Pacific, Itamar was a Managing Director and founding Co-Head of Investment Banking at Reorient Group. While there, Itamar worked with Michael Joseph and the team on several ground-breaking international transactions across multiple industries. In his role on the investment and management committees, Itamar led strategic acquisitions for the firm to both drive returns and enhance its position in the region.

Prior to his time at Reorient, Itamar was a member of the Industrials Investment Banking group at Nomura Hong Kong, which he joined as part of Nomura’s purchase of Lehman Brothers Asia in 2008. While there, he worked on a series of high profile capital raises of both equity and debt, mergers and acquisitions and privatizations/LBOs throughout the Asia-Pacific region. As a founding member of Lehman Brothers’ Principal Origination Group in Asia in 2007, Itamar had responsibilities spanning origination, analysis and investment on a pipeline of over 250 prospective deals and 13 completed deals for a total of ~US$1bn of proprietary capital invested. Itamar has a B.A. with honors from Amherst College and an MBA with honors from Columbia Business School.

Mark Harper, Hughes Fowler Carruthers, UK

Mark focuses on divorce and family law, in particular international cases and those involving trusts. He also deals with pre-nuptial and pre-civil partnership agreements.

Mark was ranked one of the top ten UK family lawyers in Spear’s Wealth Management’s Family Law Index 2013, 2014 and 2015 and was described as “without doubt the best technician in London”.

Nicholas Harries TEP, Macfarlanes LLP, UK

Nicholas is a partner in private client. He started his career as a barrister, practising from 10 Old Square, Lincoln’s Inn (a leading set of traditional Chancery chambers). He subsequently spent two years in the private client department of PricewaterhouseCoopers, where he worked closely with Stephen Alcock QC before moving to Macfarlanes in 2003. He continues to hold Higher Courts rights of audience.

His current practice allows him to draw on both the detailed trust law and drafting experience gained at the bar and the technical tax experience gained later in his career. It embraces the full range of tax, estate and succession planning advice for UK and internationally-based individuals and families, even where there is no significant connection with the UK.

Nicholas has lectured in the UK and Switzerland at industry conferences and is a frequent author of technical articles in industry journals.

Paul Hodgson TEP, Butterfield Trust (Guernsey) Ltd, Guernsey

Paul Hodgson is Managing Director of Butterfield Trust (Guernsey) Limited and a member of the Butterfield Group’s Trust Executive Committee. In his role Paul is
responsible for all aspects of the day-to-day running of the Guernsey team of over 80 staff and continues to be involved with a small number of key client relationships. He is a Chartered Accountant, Trust and Estate Practitioner and Fellow of the Chartered Institute for Securities and Investments.

Paul regularly speaks and acts as chairman at industry conferences on wealth structuring and fiduciary services. He is Joint Deputy Chairman of the Guernsey Association of Trustees.

Nathan Kaiser TEP, Eiger, Taiwan

Nathan has over 15 years of professional experience in the Greater China area, notably in Shanghai, Beijing, Hong Kong and Taipei, advising clients in all matters pertaining to investment, corporate law, commercial trade, employment law and commercial disputes.

As a founding partner of the firm Eiger, Nathan spends his time in the Greater China area, with regular visits to Europe. He serves on the board of companies in Greater China, as well as in his native Switzerland. Nathan further provides advice with regard to various international private law issues arising out of cross-border distribution matters and related tax issues. He is also involved in litigation and arbitration, serving as a panel arbitrator in both mainland China and Taiwan. Originally from Solothurn, Nathan studied in Lausanne, Strasbourg and St. Gallen. Prior to coming to Asia, he worked in Zurich, Lausanne and Paris.

Thelma Kwan TEP, Barrister, Hong Kong

Thelma has previously spent 24 years in the private banking industry, in the trust and wealth planning segment of various private banks. While her mandates were various, Thelma’s interest and focus had been serving clients in their wealth planning needs with a holistic approach; taking into regard issues including family succession planning, asset protection, business succession, and cross border tax issues.

She was on the IFC Power Women Top 100 in 2013, which named influencers and professional women globally in the financial industry in international financial centres. The list recognizes women of achievement who are opinion formers and promote business excellence in their home jurisdiction. She was also named in the “Leading Trustee” category in the Citywealth Leaders List in 2013.

Wendy Lam, Stevenson Wong, Hong Kong

Wendy was admitted to practise as a solicitor in Hong Kong in 1992 and in England and Wales in 1994. She joined the firm in 2001.

Within the Private Client Practice in the firm, Wendy specializes in Succession Planning and Probate work, assisting both local and expatriate clients in estate planning, including drawing up complicated Wills, advising clients on the setting up of trusts and handling probate applications in respect of estates situated inside and outside of Hong Kong. Wendy also has significant experience in family law disputes, children issues including abduction
of children and financial matters.

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**Lara Mardell, Ogier, Hong Kong**

Lara provides advice to private clients, trustees, charities and other philanthropic organisations and their professional advisers on structuring with offshore trusts, foundations and related entities, including BVI Vista trusts, Cayman STAR trusts, reserved powers trusts, private trust companies, offshore companies, Jersey foundations and Guernsey foundations and wills.

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**Todd D. Mayo, Perspecta Trust, US**

Todd D. Mayo is a principal and general counsel of Perspecta Trust. In those roles, he works with clients in designing and implementing trust and wealth strategies, and he oversees legal matters within the company.

Before joining Perspecta Trust, Todd was a partner in Cleveland, Waters and Bass, where he focused on private client matters. He previously was president of Cambridge Trust Company of New Hampshire and a senior vice president of Cambridge Trust Company.

Todd actively participates in legislative and regulatory initiatives to enhance New Hampshire’s position as a leading jurisdiction for trusts and trust companies. He is the principal author of several portions of New Hampshire’s trust laws. In addition, as a member of a public-private working group that revised the state’s banking laws, he was a principal author of the New Hampshire Trust Company Act and the New Hampshire Family Trust Company Act.

Todd is a former president of the New Hampshire Trust Council and a former chair of the New Hampshire Bankers Association’s Trust Committee.

Todd is the author of *New Hampshire Trust Laws: Statutes and Commentary*, an annotated reference on the state’s trust laws, and he is the author of a chapter on trust design and administration in the forthcoming *The Private Wealth & Private Client Review (Fifth Edition)*.

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**Daniel Mijic, First Advisory Group, Hong Kong**

Daniel serves as the Managing Director of the First Advisory Group’s Hong Kong branch and its entities, namely First Advisory Trust (Hong Kong) Limited and First Advisory Management Services (HK) Limited, which in turn are companies of the First Advisory Group (hereinafter the “Group”), a Wealth Planning Group having its origins in Liechtenstein in 1954.
Daniel joined the Group in 2001 and his professional career has been based in Liechtenstein and Hong Kong, during which time he has accumulated 15 years’ experience in the provision of Wealth Planning solutions, specializing in Asset Protection and Succession Planning as a Liechtenstein Foundation and Trust expert. Educated in Liechtenstein, Daniel has completed post-graduate studies in Fiduciary Management at the University of Liechtenstein and other advanced programmes focused on Foundation and Trust services. Currently Daniel is undertaking the MBA studies with the Manchester University.

At the direction of the Group, Daniel relocated to the Group’s branch office in Hong Kong in 2014, where in his capacity, Daniel is responsible for the Group’s Hong Kong business operations. Daniel manages and sets the strategic direction of the Group’s Hong Kong office across East Asia, i.e. the Greater China region, and additionally he advises Clients in Succession Planning and Asset Protection solutions.

Alan Milgate TEP, Rawlinson & Hunter, Cayman Islands

Alan is a Partner with the Cayman Islands firm and specialises in private client services including international trust structures, private trust companies and purpose trusts, estate planning and wealth management.

He advises on the establishment and ongoing administration of Cayman Islands trusts and companies, including acting as a director of a number of private trust companies, other regulated entities and other client companies. Alan is a director of The R&H Trust Co. Ltd. and The Harbour Trust Co. Ltd., duly licensed Cayman Islands trust companies owned and operated by Rawlinson & Hunter in the Cayman Islands.

Alan has over 20 years of international experience in the financial services industry and joined the Cayman practice in December 1997. Prior to moving to Cayman, his career included experience with the taxation practice of Deloitte in Canada and audit and assurance services in Canada, New Zealand and the Cayman Islands. He is a qualified Chartered Accountant (Canada), Trust and Estate Practitioner (TEP) and a Chartered Financial Analyst (CFA) charter holder.

He is the Chairman of the Cayman Branch of STEP, a member of the STEP Caribbean Conference Steering Committee and is Chairman of the Cayman Chapter of AIMA.

Craig Murphy TEP, Zetland Trust Ltd, Hong Kong

Craig Murphy was born and educated in the UK and has more than 20 years’ experience working with private, corporate and institutional clients in structuring a wide variety of trusts; private equity and hedge funds; trading, licensing, royalty, structured insurance, asset and debt based transactions. Craig was appointed General Manager of the Zetland Group in July 2016, based in Hong Kong. Zetland Group provides trust, corporate and tax services from its offices in Hong Kong, Singapore, Shanghai, Belize, New Zealand, Tokyo and London. Craig has also worked in the Philippines, Belgium, Guernsey, Jersey, Bahamas, Canada, Cayman Islands, British Virgin Islands and London. He has been a member of STEP since 1998 and has served on its Hong Kong and BVI Committees. He is also accredited as a mediator by the Centre for Effective Dispute Resolution (CEDR).
Ryan Myint TEP, Taylor Wessing, UK and Singapore

Ryan Myint TEP is a partner in Taylor Wessing's International Private Client group. He is now based in the London office, following a secondment to the Singapore office from 2012 to 2015. He divides his time between the UK and Asia.

He advises entrepreneurs, business owners, fund managers, property developers, high profile international families, offshore trust companies and private banks. He has particular expertise in advising Asian clients, and European and Middle Eastern clients with an interest in Asia.

He specialises in trusts, wealth structuring and succession. He is an expert in multi-jurisdictional tax planning, including cross-border tax reporting, disclosure and transparency issues. He also advises on governance, family constitutions and charters, asset protection, philanthropy, and private client issues arising out of corporate transactions.

Ryan is a member of the International Bar Association, the Society of Trust and Estate Practitioners, and the Association Internationale des Jeunes Avocats (Private Client Commission and Tax Commission). He is the General Editor of the Journal of International Tax, Trust and Corporate Planning (published by LexisNexis).

Simon Ng TEP, BMO Private Bank, Hong Kong

With more than 20 years of experience in the financial service industry, Simon Ng joined BMO Private Bank as managing director, private banking, North Asia and wealth solutions, Asia in October 2015. He is also a director of BMO Trustee Asia Limited in Hong Kong. He had previously been managing director and head of Royal Bank of Canada’s Wealth Management Trust - Asia for over 19 years. Simon is a chartered accountant, qualified in Canada, and a member of STEP. He was an executive committee member of the Hong Kong Trustee Association from 1996 to 2005, and its deputy chairman between 1999 and 2000. Simon’s experience has also embraced periods with HSBC Trustee International in Hong Kong, and Deloitte & Touche in Hong Kong and Vancouver, Canada. He was named “Leading Trustees – Asia Pacific” in the CityWealth Leaders List 2012 and “Leading Private Bankers & Investment Managers – Asia Pacific” in CityWealth Leaders List 2013 & 2014.

Peter Ni TEP, Zhong Lun, PRC

Yongjun (Peter) Ni oversees the tax and wealth planning practice of Zhong Lun Law Firm, one of the largest PRC law firms. Peter has over 20 years of experience in providing PRC and international tax services to companies and private clients, including 9 years in the U.S. Peter used to lead the Greater China tax practice of White & Case and the international tax practice of Ernst & Young China. Trained as a lawyer, Peter has been continuously ranked as a Band 1 Chinese tax lawyer by leading international directories including Chambers Asia and International Tax Review. Peter is the co-author of China Taxation - Law, Practice and Planning, a
comprehensive English language treatise on Chinese tax law (published by Sweet & Maxwell) and has also developed a course, namely International Tax Planning related to Wealth Planning, for the largest private banker and wealth planner training institution in China. In addition to PRC legal education, Peter holds a LLM in Taxation from NYU and a LLM in corporate law from Harvard. He is qualified to practice law in both the PRC and the U.S.

Peter Nixon, Potential Dialogue, Hong Kong

Peter Nixon, FCPA-CA, specialises in dialogue, negotiation and development. Peter started his career with Coopers & Lybrand (Montreal) in the early 80’s and after transferring to Geneva and Hong Kong he declined partnership to specialise in negotiation. Since then his work has taken him to over 50 STEP centres of excellence including Cayman, Bahamas, Isle of Man, London, Singapore, Shanghai and Dubai. Peter’s work is focused on assisting company owners and their advisors (bankers, lawyers, consultants, auditors, regulators) identify and achieve their objectives (commercial, government, leadership, personal, family). His blue chip client list is extensive and many have been clients since the beginning of his practice.

Freek Noordman, Pereira, The Netherlands

Freek Noordman is a consultant for Pereira. Although he is an all-round professional, he mainly focuses on the planning of corporation and income tax of companies and private individuals. The clients are mainly international corporations and internationally operating private persons.

‘As a tax consultant, I am constantly challenged to solve relatively complex issues, and to find concrete solutions for complicated tax situations. I really enjoy bringing in my creativity in my work. The nice thing about working for Pereira is that not every aspect of the work is planned in advance. I have a lot of freedom to work independently.’

Educational background: tax law, University of Groningen. His final thesis consisted of researching different applications of a ‘tax exempt investment institution’ and the ‘fiscal investment institution’.

Richard Norridge TEP, Herbert Smith Freehills, Hong Kong

Richard heads up Herbert Smith Freehills’ Asia private wealth practice. He acts for high net worth individuals, their families, private banks and fiduciaries across Asia on a range of contentious and non-contentious trust and probate issues together with charitable and family company matters. In a number of instances, this includes advising mental health committees and estate administrators. Richard also has extensive experience in acting for international banks and individuals in cases involving fraud.

Richard is a member of the Society of Trust and Estate Practitioners (STEP) and the Association of Contentious Trust and Estate Practitioners (ACTAPS). He is consistently ranked as a leading practitioner by the legal directories.
Scott Peterman, Jones Day, Hong Kong

Scott Peterman has extensive experience in forming all types of funds, from large pan-Asian private equity and venture capital funds to infrastructure and real estate funds, private REITs, hedge funds, hybrid funds, emerging manager platform funds, Hong Kong authorized funds, and emerging market ETFs. He has also concluded more than 150 separate account arrangements, representing a range of sovereign wealth funds, universities, seeding and first-loss capital programs, family offices, and high net worth investors, as well as a host of other bespoke single-investor and single-investment arrangements.

James Quarmby TEP, Stephenson Harwood LLP, UK

James is a Partner and the Head of Private Wealth at the international law firm Stephenson Harwood LLP. James’ team has won several awards, including Private Client Law Firm of the Year at the 2015 British Legal Awards. James is also named in this year’s "Top 50 Most Influential Private Client Practitioner" list, as compiled by ‘eprivate client’

James has a wide-ranging practice dealing with all aspects of private international wealth and he is highly respected for his practical and rigorous approach. His team has a particularly well regarded practice advising upon offshore pensions and life assurance. The Legal 500 describes him as a “very experienced tax lawyer with commendable professionalism and responsiveness who specialises in innovative tax planning work”. He is also recognised by Chambers UK as a “leader in the field” and was described in the 2013 edition as “the fount of all knowledge”

James lectures widely and is frequently published in the national press on the subject of tax planning and policy. He has made numerous appearances on national and international broadcast media, including BBC’s Newsnight, BBC TV News, Radio 4’s Today programme, Bloomberg TV and Radio 5Live. As well as being a solicitor, James is a Registered Tax Technician and is regulated by the Association of Tax Technicians (ATT). He is an active member of STEP and the International Tax Planning Association (ITPA).

Professor Anselmo Reyes, Representative, Hague Conference on Private International Law, Asia Pacific Regional Office

Anselmo Reyes has been Professor of Legal Practice at Hong Kong University since October 2012. Before that, he was a judge of the Hong Kong High Court from 2003-12, when he was in charge of the Construction and Arbitration List (2004-8) and the Commercial and Admiralty Lists (2008-12). He was called to the Hong Kong Bar in 1986, taking silk in 2001. In April 2013, he became Representative of the AsiaPacific Regional Office of the Hague Conference on Private International Law. He became an International Judge of the Singapore International Commercial Court in January 2015 and an Overseas Bencher of the Inner Temple in October 2015.
Keith Robinson TEP, Appleby Global, Bermuda

Keith Robinson is a partner in the Dispute Resolution department in Bermuda. Keith’s practice focuses on high value trust disputes and restructurings often with a multi-jurisdictional element. He has advised and represented trustees, beneficiaries and other fiduciaries. Keith has been involved in many of the major trust cases in Bermuda over the last number of years and in the last year has appeared in a number of legally significant reported decisions.

Keith is ranked, since 2014, as a ‘Leader in his Field’ by Chambers Global in which he is described by sources as being "very effective as an advocate." Clients also rate him highly, remarking on his detailed knowledge of trusts issues and "to-the-point legal advice." He has been recommended, since 2013, by Legal 500 Caribbean where he was most recently described as “a standout individual who is by any standard a first-class lawyer.” Keith is recognised on Citywealth’s 'Leader List' 2015 and in The International Who's Who of Private Client Lawyers 2015.

Keith has written extensively, and spoken widely in Bermuda and internationally, on trust litigation. He is an elected member of the International Academy of Estate and Trust Law (TIAETL) and an active member of STEP, currently serving as vice-chair of the STEP Bermuda Committee. He further serves on the Trust Focus Group and the Trust Law Reform Committee of the Bermuda Business Development Agency (BDA).

Jacqueline Shek TEP, HSBC, Hong Kong

Jacqueline heads the legal team that supports HSBC’s Private Wealth Solutions business in Asia.

Jacqueline is admitted as a solicitor of the High Court of Hong Kong and of the Supreme Court of New South Wales, Australia. She is a member of the Society of Trust and Estate Practitioner. Jacqueline is also a qualified Chartered Accountant, a Fellow of the Tax Institute of Hong Kong and a Fellow of the Tax Institute of Australia. Jacqueline currently serves on the Board of the Hong Kong Trustees’ Association and as a member of Hong Kong Law Society’s Revenue Committee.

Michael Shikuma TEP, Shikuma Law Office, Japan

Michael H. Shikuma specializes in international tax and cross-border estate planning in the US, Japan, and the Asia-Pacific region. With over 25 years of professional practice experience, he assists individuals and cross-border families with multi-jurisdiction asset holdings in developing tax-efficient structures for holding assets in various jurisdictions and minimizing gift, estate and inheritance taxes.

In addition, he assists with cross-border probate and succession procedures and tax compliance for decedents with cross-border families and/or assets. He also assists entrepreneurs, SMEs, global companies, and investment funds with tax planning for cross-border corporate restructuring,
investment and financing structures, and mergers and acquisitions, in Japan, the US, and the AsiaPacific region. He has extensive US federal and state income, sales, and transfer tax experience, as well as experience in representing individual and corporate clients in tax controversy cases.

Geoffrey Shindler OBE TEP, Old Trafford Consulting Ltd, UK

Geoffrey Shindler OBE is a Director of Old Trafford Consulting Ltd a Manchester based trust advisory company. He specialises in wills, trusts, capital taxation and estate work.

Geoffrey has a degree and post graduate degree in law from the University of Cambridge and is a solicitor and registered Trust and Estate Practitioner. He was one of the founder members of STEP and its Chairman between 1994 and 1998. He was Chairman of its Education Committee when its Diploma examination was developed and introduced. He is now its President.

He is Chairman of Manchester Camerata Charity and he serves on the Board of Directors of the Royal Exchange Theatre, Manchester. He has been a trustee of the Manchester Portico Library Charitable Trust and is now Chairman of the Keyboard Charitable Trust. He is a board member of Lancashire County Cricket Club. He is also a member of the UK based Trust Law Committee and has sat on various committees studying the working of inheritance tax legislation in the UK.

Paul Stibbard TEP, Rothschild Trust, UK

Joined Rothschild July 2012 as Executive Vice Chairman, primary focus on Trusts/Wealth Management. Former Co-Chairman for Global Wealth Management, Baker & McKenzie; Educated Cambridge University, INSEAD International Business School (MBA, Dean’s List); Specialist areas: cross-border tax, trust and succession and substantial family-owned business, particular focus on Islamic law clients.

Dr. Tim Summers, Senior Consulting Fellow, The Royal Institute of International Affairs, Hong Kong

Dr. Tim Summers works on the politics, policy, and international relations of contemporary China. He is a non-resident Senior Consulting Fellow on the Asia Programme at Chatham House, teaches at the Centre for China Studies, The Chinese University of Hong Kong (CUHK), and consults commercially on China. Recent publications include China’s Global Personality (Chatham House research paper, June 2014) and a book, Yunnan - A Chinese Bridgehead to Asia (Chandos 2013). Tim was a British diplomat for 13 years, including a posting as Consul-General in Chongqing, southwest China, from 2004 to 2007. He holds a PhD in Chinese Studies from CUHK, and an MA from Queens’ College, Cambridge.

Hao Wang TEP, RayYin & Partners, PRC
Ms. Hao Wang is the founding partner of RayYin & Partners PRC Lawyers. Ms. Wang graduated from King's College London. She is the only member from mainland China for Academy of International Trust and Estate Law. Chambers has selected her as the best Private Clients/ Wealth Management lawyer in Mainland China since 2013. She provides services for many private banks, family offices, trust companies and high net work individuals in China.

Shân Warnock-Smith QC TEP, ICT chambers, Cayman Islands

Shân Warnock-Smith Q.C. is an English qualified barrister and a Cayman Islands attorney specialising in the whole range of international wealth structuring issues. She is both an adviser and a litigator of trust and estate disputes. She is ranked among the leading barristers and attorneys in her field globally and is at the cutting edge of developments in trusts and estates. Her extensive practice takes her around the world from her bases in Cayman and London to advise and litigate in all the major jurisdictions in which wealth management issues arise. At present Shân is particularly interested in trust restructuring to accommodate the interests of beneficiaries with divergent interests, for example those of US persons with interests in foreign trusts.

Richard Wilson QC TEP, Serle Court, UK

Richard Wilson QC has a practice encompassing litigation, drafting and advisory work across a wide range of traditional and commercial chancery, with a strong emphasis on trusts and probate (both contentious and non-contentious), related company and partnership law, claims under the Inheritance (Provision for Family and Dependents) Act 1975, tax, professional negligence and civil fraud.

Richard's work frequently involves offshore matters and issues of private international law. He has appeared in the Supreme Court of Gibraltar, the Grand Court of the Cayman Islands and the Eastern Caribbean Supreme Court and Court of Appeal and has given expert evidence of English Law in the Royal Courts of Jersey and Guernsey. He frequently acts in cases in all of the principal offshore jurisdictions including those mentioned above, Bermuda, the Bahamas and St Vincent and the Grenadines.

Before commencing practice at the Bar, Richard worked as a tax consultant with Price Waterhouse.

John Wong, PriceWaterhouseCoopers, Hong Kong

John is a Tax Partner and China and Hong Kong Leader in Private Client Services. He has more than 25 years of experience specialising in helping high net-worth individuals and families primarily based in Asia Pacific with Chinese and other nationalities to devise tailor-made tax planning, family wealth and business succession planning to achieve the specific personal and family goals of such clients by using trusts, insurance and other appropriate structures for the
implementation of such planning as well as family corporate governance. He has extensive experience in advising professional bank and non-bank trustees on trust matters and provide training to them on wealth and tax planning. He is also a frequent speaker at wealth forums and tax seminars.

Michael Wong, Baker & McKenzie, Taipei

Michael has devoted a substantial amount of his time in recent years working with high net worth and cross border families centered in Taiwan and Greater China. In doing so he has been working with private clients and institutions navigating the turbulent currents in the area of international taxation, trusts, income, estate and gift taxes, inheritance laws, disclosure requirements and compliance. He is a regulator speaker in local and international conferences and a recognized expert in the area for his more than 25 years of legal experience in the community. Michael is head of the M&A, Private Equity and Tax practice groups in the Taipei office.

Vicky Wong TEP, LGT Bank, Hong Kong

Vicky Wong is the Head of Key Client Solutions with LGT Bank in Hong Kong. In this role, she is responsible for assisting LGT’s most strategic Asian based clients with the non-investment aspects of their wealth planning. She also plays a key role in de-veloping LGT’s Asian business and serves on LGT’s Executive Board Asia. Prior to joining LGT Group, Vicky was an Executive Director at Goldman Sachs (Asia) L.L.C. and the Head of its Strategic Wealth Advisory Team (Asia), for over 10 years. Vicky was based in Hong Kong and was responsible for advising private clients of Goldman Sachs on the areas of cross-border planning, pre-IPO structuring, succession planning and philanthropy.

Patricia Woo TEP, Squire Patton Boggs, Hong Kong

Patricia Woo is a fund, trust and tax lawyer noted for her practice in helping global ultra-high-net-worth families set up and operate investment-centric, service-centric and comprehensive value-centric family offices. Her expertise spans structuring of single family offices and multi-family offices, regulatory licensing and exemption, family investment guidelines, internal control and compliance manual, family constitutions, family council, hiring and compensation, internal hedge fund and private equity fund formation, management and administration, negotiations with private bankers, prime brokers, global custodians, execution brokers and administrators, and such charitable and philanthropic ventures as establishing and restructuring of charities.

She also handles matters arising at different stages of a trust’s lifecycle, namely, creation of trusts and private trust companies, their management, restructuring and termination, and loan and acquisition transactions. She drafts complicated wills, enduring powers of attorney and handles other cross border succession and tax issues and advises private banks and trust companies in the launch of new products and services that target ultra-high-net-worth families.