

STEP HONG KONG LTD
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A WEBINAR ON

WILLS AND PROBATE IN THE CAYMAN ISLANDS

Speaker: Anthony Partridge (Partner, Ogier Cayman)
Wisdom Hon (Senior Associate, Ogier Hong Kong)

Date: Thursday, 23 July 2020

Time: 6.00 pm – 7.00 pm

By Zoom: A Zoom link will be provided for participants two days prior to the webinar.

The talk: When a non-Cayman domiciliary dies owning Cayman Islands assets such as shares in a Cayman Islands company and interests in Cayman Islands funds, the transmission of such Cayman assets is governed by the Cayman Islands law and a grant of representation issued by the Grand Court of Cayman is usually required. The registered office provider is not authorised to update the register of members or limited partnership interests without a Cayman grant. Directors and general partners ought not to approve share/interest transfers involving a deceased shareholder/limited partner without reviewing a Cayman grant. The webinar will discuss the procedure and documents required to secure a Cayman grant and highlight the pitfalls that practitioners should be mindful of.

To facilitate the application for a Cayman grant, one could make a specific Will to dispose of Cayman assets. The webinar will discuss the recently enacted Formal Validity of Wills (Persons Dying Abroad) Law which sets out the general rule to determine the formal validity of a Will executed by a non-Cayman domiciled person.

Part of the presentation will have been pre-recorded but a live Q&A session will follow the talk.

The speakers:

Anthony Partridge is a partner at Ogier Cayman. He specialises in all aspects of non-contentious private trust matters, wealth structuring for institutional trustees and high net worth individuals. He has particular expertise in the use of foundation companies, cross-border succession and probate matters, including resealing foreign grants in the Grand Court of the Cayman Islands. Anthony also advises executors, beneficiaries and on-shore counsel in relation to applications for grants of probate and letters of administration in deceased estates before the Grand Court of the Cayman Islands and resealing foreign grants, as well as drafting wills specifically tailored for assets located in the Cayman Islands.

Wisdom Hon is a senior associate at Ogier Hong Kong. She leads the private wealth team in Hong Kong advising international wealthy families and trust companies on estate and succession planning, trust structuring, family governance, probate and estate administration. She is the contributing author to Lexis Hong Kong Practical Guidance on international private client practice. She is a qualified trust and estate practitioner (TEP) since 2012 and advises on wealth structures and estate matters relating to BVI, Cayman Islands, Guernsey and Jersey.

Those interested should register using the attached seminar enrolment form.

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WEBINAR ENROLMENT FORM

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The cost per person will be HK\$150 for members of STEP and the HK Trustees' Association Ltd, and HK\$200 for non-members. Applications for three or more members can enrol at a special discount fee of \$125 per person. Student members of Hong Kong University and Chinese University can enrol at a special rate of \$50.

Please complete this form and return it to us at the PO Box address above with your cheque made payable to **STEP Hong Kong Limited** to arrive on or before 21 July 2020. Alternatively, you can deposit cash/cheque to our bank account (Standard Chartered Bank, A/C No. 447 0 069831 3) and send us a copy of the deposit slip on or before 21 July 2020.

Name of STEP or HKTA Member: _____

Name(s) of attendee(s) _____

Cheque total: _____ Cheque No. _____

Contact Person: _____ Telephone: _____

Email: _____

(NB: Payments are non-refundable unless the event is cancelled by the Society. Bookings are only confirmed with payment, on a first-come, first-served basis)