Speakers' biographies

Assad Abdullatiff TEP, Axis Fiduciary Ltd, Mauritius

Assad Abdullatiff is a founding partner and Managing Director of AXIS Fiduciary Ltd, a leading Mauritius-headquartered independent trust company providing a full spectrum of fiduciary and corporate services to an international client base. Assad holds an LLB (Hons) and an LLM in Business Law and is admitted to the Bar of Mauritius. He is a member of the Society of Trusts & Estate Practitioners (STEP), past Chairman of the Mauritius branch, Council member representing the Africa/Arabia region and has recently been appointed to the Board of Directors of STEP Worldwide.

Andrea Benkenstein, PwC, South Africa

Andrea has been with PwC for 10 years and started her career as an auditor. She works with leaders across a broad spectrum of organisations, including large corporates and small to medium family owned businesses. She is engaged as a facilitator and trainer on various programmes including coaching at PwC and family business events across Africa. Her EQ and Value-based methodology enhances the process of self-awareness, management as well as accountability thereof in the workplace and in person. She assists families on a day to day basis with writing their owner strategy which translates into their family constitution. She is registered with COMENSA as well as the South African Institute of Chartered Accountants (SAICA). She recently published the first Africa NextGen survey for PwC (2020) and is the PwC NextGen lead for Africa. She runs the virtual family business series for PwC and writes the content for their online platforms.

Claire Cooke TEP, Cone Marshall Ltd, New Zealand

Claire Cooke is a director of Cone Marshall Limited, a legal, accounting and fiduciary services firm based in New Zealand.

Claire was born and raised in South Africa. She studied at Rhodes University and Nelson Mandela Metropolitan University before emigrating to New Zealand in 2004 and completing the examinations to convert her qualifications. She holds a practicing certificate issued by the NZ Law Society and is a full member of STEP NZ.

Claire specialises in international trust and tax planning and fiduciary services. She particularly relishes the challenges associated with the restructuring of existing structures which span over several jurisdictions.

Catherine de Maid TEP, Burges Salmon LLP, UK

Catherine is a Director in the firm's 40 lawyer strong Tax and Private Client Team. Catherine specialises in the following areas:

- International Tax and Trusts
- Non-Domiciliary Tax Planning
- Advising trustees on their UK tax and reporting obligations
- Advising trustees on risk areas including fiduciary, tax, compliance and reputational risk
- Philanthropy

Catherine advises a wide range of clients, from high net worth individuals to leading private banks and other financial institutions. Catherine has a particular focus on advising clients with a South African connection, having worked in South Africa for 12 years where she specialised in the establishment of offshore structures for South African individuals and companies.

Harry Joffe, Discovery Life, South Africa

Harry Joffe is Head of Legal Services at Discovery Life and has 18 years' experience in estate planning, tax, trusts and insurance matters. He frequently runs training sessions all over South Africa for large groups of financial advisors, trustees and representatives of trust companies in these fields.

Harry is the convener of the ASISA [body of all insurance, mutual fund and linked product companies in South Africa] sub-committee on policyholder tax matters. He also frequently writes articles for the Insurance and Tax magazine as well as the STEP Journal. He has been published in De Rebus, the South African Attorney's magazine.

He has spoken about tax, trusts and estate planning issues on Talk Radio 702 and has frequently appeared on TV programs such as Business Day TV and CNBC Africa. He often addresses both local and international conferences, having spoken, inter alia, at 6 STEP Conferences in Mauritius, as well as three STEP Conferences in the Caribbean.

Harry holds several qualifications including: a BA and LLB degree, and a Higher Diploma in Tax from Wits University. He also has a LLM degree in Tax from the University of Johannesburg. Harry is also a qualified Certified Financial Planner for both the life and health disciplines. He recently obtained a diploma in company law from the Wits University.

He is a member of STEP, and is Chairman of the Johannesburg branch. He successfully organised and chaired the first ever STEP South Africa conferences held in Johannesburg in 2012, 2014 and 2018, all of which attracted over 150 people. He was also a co-organiser and co-chair of the STEP South African conference in Cape Town in 2016.

Rob Macdonald, Fundhouse, South Africa

Rob is Head of Strategic Advisory Services at Fundhouse. He offers consulting, coaching and facilitation services primarily to independent financial planning and asset management businesses. He also develops and facilitates training programmes in the areas of Management and Behavioural Coaching.

Rob has held several senior executive positions in the investment industry and has worked as an independent coach and consultant. Before joining the industry, Rob was Director of the MBA Programme at the UCT Graduate School of Business. He has a MPhil degree in Management Studies from Oxford University, is a CFP® Professional, and is trained in Coaching and Counselling.

James Painter, MP Analytics Ltd, UK

James is a co-founder and Director of MP Analytics Limited, the business that runs the Managed Portfolio Indices as a "STEP Member Service".

James is a Chartered Fellow of the Chartered Institute for Securities and Investment, and has extensive experience within the financial services industry, also maintaining roles with ESG reporting and consulting business, True Limited and Jersey based investment consultants Concentric Financial Services Limited. In a previous role James was an early adopter of fintech which brought cost effective portfolio monitoring solutions to fiduciaries globally, making James a leading authority on trustee investments.

Paolo Panico TEP, Paolo Panico's Law Chambers, Luxembourg

Paolo Panico is an "Avocat à la Cour" in Luxembourg, a solicitor in Scotland and a Registered European Lawyer in Cyprus. He is also Chairman of Private Trustees SA, an independent trust company in Luxembourg, and a member of the board of directors of Teton Trust Company LLC, a regulated trust company in Woming, USA. Paolo is Deputy Chairman of the STEP Benelux branch as well as of the International Tax Planning Association (ITPA).

Paolo is a member of the executive committee of the "Associazione Il Trust in Italia" in Italy and an academician of the International Academy of Estate and Trust Law (TIAETL). He teaches International and Comparative Trust Law at the LLM of the University of Liechtenstein and Legal Structures at the Master in Wealth Management of the University of Luxembourg. His publications include: Private Foundations. Law and Practice (Oxford University Press, 2014) and International Trust Laws, 2nd edition (Oxford University Press, 2017).

Michael Power, Ninety One, South Africa

Michael joined Ninety One as a strategist in December 2002. His current responsibilities include understanding how the shift in the centre of economic gravity from West to East is impact on the world of investment and in particular how it is opening up new investment opportunities for Ninety One's global client base.

He began his career working in the Middle East department of Chase Manhattan Bank, followed by the corporate finance department of Anglo American in South Africa. Michael then moved to the London corporate finance department of NM Rothschild & Sons where his work had a strong natural resource emphasis. Michael then worked for a HSBC-Equator Bank in Kenya for four years before returning to the UK to work at Baring Asset Management as a director in their emerging markets department, where he was head of Africa and the Middle East as well as heading the natural resources sector, and was also portfolio manager for the Pan African Simba Fund.

Catharina Prym, PwC, Germany

Catharina Prym is an international specialist for family businesses. She consults multi-generational business families in Europe and Africa as a PwC global expert and develops owner strategies, family constitutions and succession plans with her clients. She designed and brought to life PwC's annual Africa Family Business Conference, the first of its kind on the continent. She was born and raised in Germany as a fifteenth generation member of the Prym Family, one of the oldest entrepreneurial families in the world. She has been honored with the Top Family Business “Rising Star Award” at the European Families in Business Awards 2015.

Peter Rosenberg TEP, Stonehage Fleming US LLC, USA

Peter is Head of the Stonehage Fleming's Family Office Division in the United States based in Philadelphia. He assists families and other private clients concerning their personal and investment connection to the U.S. Peter is a practicing Attorney, focusing on the U.S and international estate and trust tax planning, compliance and administration.

Peter joined the Group in 2007 after practicing Law at Duane Morris LLP and previously Cozen O'Connor. He holds a LL.M. Tax from Villanova University, a J.D. from Temple University and a B.A. from the University of Pennsylvania. Peter is admitted to practice in New York, Pennsylvania and in the United States District Court for the Eastern District of Pennsylvania.

Anthea Stephens, Maitland, South Africa

Anthea Stephens joined Maitland in June 2018. She is a highly qualified tax and fiduciary specialist with 20 years of international experience spanning the USA, UK, Europe and South Africa.

Anthea manages global fiduciary relationships with ultra high net worth clients and can advise on and form offshore structures for both personal, commercial and philanthropic investment purposes. She joined Maitand from Standard Bank Wealth & Investment. Prior to that she was with State Street Global Advisors where she gained in-depth knowledge of institutional fund regimes and was responsible for implementing a new product development team and process for State Street Global Advisors Europe and Asia Pacific out of London and Paris.

Dr Judith Taic, Dr Judith Taic Tax Law Office, Israel

Judith Taic, Dr. Jur., LLM Taxation (NYU), TEP, heads her own boutique law office in Tel Aviv, focusing on taxation matters in Germany, the U.S. and Israel. She advises high net worth individuals in wealth planning, philanthropy and in various taxation matters with respect to trusts, foundations, Establishments and other vehicles. She earned her doctorate in the field of international taxation from the Ludwig Maximilian-University of Munich, where she published her book on transfer pricing of intangible assets. She received her LLM in taxation from New York University. She is a qualified and licensed attorney in Germany, New York and Israel.

Deborah Tickle TEP, University of Cape Town, South Africa

Deborah Tickle (Chartered Accountant) is an adjunct associate professor at the University of Cape Town where she lectures the tax Masters course. As managing partner of the tax department at KPMG (Cape Town), she led the team for ten of the 31 years she spent consulting to large, listed and global clients of the firm. She serves on the Davis Tax Committee, formed by the SA Minister of Finance to establish whether South African tax policy aligns and supports overall government policy. She also served as deputy chair of the national tax committee of the SA Institute of Chartered Accountants.

Hugo van Zyl TEP, TAXFORUM, South Africa

Back in Cape Town, in private tax practise following nearly two amazing years with First Rand Group, Wealth & Investment [Fiduciary Advice, Sandton, Gauteng]. While at SARS he played a key role in the implementation of RSC levies, VAT and later CGT, albeit in 2001 as an external trainer and lecturer.

Hugo is an experienced trainer, lecturer and “GO TO” industry specialist. Need to make a call on #TaxMigration vs. #FinancialEmigration because of #Tax2020 (R1m capped foreign remuneration exemption)? Yes, Hugo is indeed your best @Wegkaner specialist able to guide you as to the pros and cons!

Having lectured across South Africa (in own name, representing SARS, SA Institute of Tax Professionals, SA Institute of Chartered Accountants, STEP and more recently First Rand Bank’s FNB Fiduciary Advice), the United Kingdom, The Netherlands, the USA, 2017 STEP Mauritius Conference, FISA AGM 2020 and in the UAE (2019 and 2020).

Hugo is not only a PBO/NGO specialist providing tax and practical advice; he also spent many years as national treasurer for both the Association of Round Tables (ARTSA as it was then known) and Chaine des Rôtisseurs Afrique de Sud (www.chaine.co.za).

Hugo spent many years in Gauteng, Hugo and his spouse relocated to Hermanus (2012), where he joined the then Cashkows (as they were then known). Hugo then transferred to Cape Town where he continued to be known by his international Twitter name @wegkaner. Since 1993, Hugo has assisted several expats, Saffas and global citizens to enter and exit South Africa, not only from a tax perspective but also as a Cross-Border Exchange Control and multi-jurisdictional trust and estate specialist.

Johan van Zyl, Stonehage Fleming Financial Services (Pty) Ltd, South Africa

Johan is the Chairman of Stonehage Fleming South Africa and a member of the Group Executive Committee. He is an adviser to a several ultra-high net worth South African families, serves as a director of a number of investment companies and trusts and acts as an independent trustee to various family trusts and public benefit organisations.

Johan joined the Group in 2010 to start the Investment Management Division in South Africa and was appointed as CEO of Stonehage Fleming South Africa in 2013.   Prior to joining the Group, Johan was an Investment Manager at Fleming Family & Partners in London.

Johan holds a Bachelor of Engineering (Industrial Electronic) from the University of Stellenbosch and is a CFA Charter holder.

Rupert Worsdale TEP, Maitland, South Africa

Experience

Rupert has a broad-ranging practice, covering corporate tax, personal tax, trustsand investment funding. In the field of corporate tax, he advises corporations on how to structure cross-border acquisitions and how to optimise the structure of their existing international operations.

In the field of personal tax, he advises individuals on tax residence issues and tax planning issues. In the field of trusts, he advises clients on how to resolve problems with existing trust structures, the most appropriate structures for the preservation, enhancement and devolution of wealth and the use of trusts and other structures for commercial purposes.

In the field of investment funds, he advises clients on the tax structure of investment funds and how to resolve problems with existing fund structures. Although technically qualified in South Africa and the UK, Rupert has worked with the laws of, and the lawyers in, a wide variety of jurisdictions and specialises in finding the appropriate jurisdictions and structures to meet the client's needs.

Qualifications

BCom LLB (University of Stellenbosch, 1978)
HDip Tax(University of Witwatersrand, 1981)
LLM Taxation(University of London,1982)