Moderator:

Steve Sokic TEP, Group Head of Private Wealth, IQ-EQ

Steve leads IQ-EQ's global Private Wealth segment and sits on the group's executive committee. His dedication to and reputation within the private client, trust and family office industry over the last 27+ years is widely respected and prior to IQ-EQ has included private client stewardship, fiduciary, and executive roles globally at Sanne, Royal Bank of Canada and Deloitte.

He is a frequent speaker at international private client industry events, holds several professional qualifications including Chartered Professional Accountant (CPA), and is a tri-national of Canada, Croatia and Britain.

Panellists:

Dean C. Berry, Partner, Cadwalader, Wickersham & Taft LLP

Dean Berry is Chair of the Private Client Department at Cadwalader, Wickersham & Taft LLP in New York. His clients include U.S. and non-U.S. high net worth individuals and families, fiduciaries, trust companies and non-profit charitable organizations. Specializing in complex international trust and estate planning, he counsels clients on developing and implementing effective and tax-efficient strategies for the preservation, management and transfer of private wealth. Dean has presented lectures and seminars in this field in the United States and around the world, and is a member of the International Academy of Estate and Trust Law.

Christopher "Chip" Martin TEP, Co-founder and President, Concord Trust Company

Chip is co-founder and President of Concord Trust. His primary responsibilities at CTC include strategic planning, business development and technology platforms. Prior to CTC, Chip was a member of the senior management team at Bottomline Technologies, a publicly traded company providing software solutions to the global financial services industry. His banking experience, combined with his extensive general management and business mergers and acquisition experience, helps him lead CTC's growth initiatives and work through the structuring issues that invariably surface in clients' complex trusts. Chip holds a degree in economics with honours from Dartmouth College and an MBA from Harvard University.

Hal J. Webb TEP, Partner, Bilzin Sumberg Baena Price & Axelrod LLP

Hal is a trusted advisor and counsellor to HNW international families, particularly in the U.S., Canada, Latin America, Europe, the Caribbean, and Middle East. As Head of Bilzin Sumberg's International Private Client Services and Partner in the Firm's Tax & Estate Planning Group, Hal advises HNW private clients, family offices, and trust companies concerning global tax estate planning. A frequent author and lecturer on international tax and estate planning topics and former Chair and Director of the Miami Branch of STEP, Hal is consistently recognized by legal publications and his peers as being a top tax and estate planning lawyer.