

**DRAFTING TRUSTS & WILL TRUSTS IN SINGAPORE**

Supreme Court Auditorium, Basement 2, Supreme Court Building (1 Supreme Court Lane)  
6 November 2007 (Tuesday) ♦ 5.00-7.45pm

**About this Seminar**

Join us for this timely seminar presented by 2 leading practitioners who are the coauthors of the newly published book on **"Drafting Trusts & Will Trusts in Singapore"**.

Mr. James Kessler QC will discuss "Recent Cases and Developments Relevant to Trusts in Singapore" while his co-author Mr. Lee Chiwi will share his thoughts on "Drafting Trusts and Will Trusts in Singapore" touching on the following issues:

1. Overview
2. Structuring of Singapore Trusts
3. Protectors and Reserved Powers Trusts
4. Will Trusts

**Seminar Programme**

4.30-4.45pm	Registrations & Refreshments
4.45-5.00pm	Launch of the book "Drafting Trusts & Will Trusts in Singapore"
5.00-5.10pm	Opening Remarks & Overview by Chairperson: <i>Mr. Bill Lexmond - President, STEP Singapore</i>
5.10-6.10pm	Recent Cases and Developments Relevant to Trusts in Singapore <i>Mr. James Kessler QC</i>
6.10-6.30pm	Networking Break
6.30-7.30pm	Drafting Trusts and Will Trusts in Singapore <i>Mr. Lee Chiwi - CEO, British and Malayan Trustees Limited</i>
7.30-7.45pm	Q&A Session & Closing Remarks

All delegates enjoy a 10% discount off the book **"Drafting Trusts & Will Trusts in Singapore"**!

**About the Chairperson****Mr. Bill Lexmond**

Bill Lexmond is the Managing Director of Wealth Planning for UBS in Asia Pacific. Bill has been living in Asia since 1989, arriving in Singapore in 1994. He studied in Canada at University of Waterloo (Mathematics) and Queen's University (Law). He has been involved in trusts and taxation matters for over 20 years, in Canada and in Asia. In Singapore, prior to joining UBS in 2004, Bill was with PricewaterhouseCoopers for 7 years and Citibank for 2 1/2 years. Bill is currently the Singapore Chair of the Society of Trust and Estate Practitioners and is on the Board of the Singapore Branch of the International Fiscal Association. Bill has spoken at and/or chaired many seminars in Asia, including the very successful inaugural STEP Asia Conference held in Singapore October 2005.

**About the Speakers****Mr. James Kessler QC**

James Kessler QC is a leading practitioner at the English Revenue bar. He is the author of *Drafting Trusts & Will Trusts*, *Taxation of Foreign Domiciliaries*, and *Taxation of Charities*. *Drafting Trusts & Will Trusts* is gradually appearing in versions for different jurisdictions around the world, including the Channel Islands, the Cayman Islands, Canada, Australia, and most recently, *Drafting Trusts & Will Trusts in Singapore*. James is a founder member of STEP and founder of the Trusts Discussion Forum.

**Mr. Lee Chiwi**

Chiwi Lee is the Chief Executive Officer of British and Malayan Trustees Limited, an independent trust company registered under the Trust Companies Act. British and Malayan Trustees Limited, incorporated in 1924, is Singapore's oldest trust company and is listed on the main board of the Singapore Exchange. Prior to his appointment, and for most of his career, Mr Lee was in legal practice with various law firms in Singapore from 1987 until 2004. Mr Lee read law in the UK and qualified as a Barrister-at-Law in 1986. He was called to the Singapore Bar in 1988. He has an MBA from the Nanyang Business School (1996) and is a member of STEP (Society of Trust and Estate Practitioners).

He is the author of two books, the first titled "Legal Aspects of Unit Trusts in Singapore" (2001) and the second titled "The Lexington Trust Guide to Succession and Trusts in Wealth Management" (2005). He is also co-author of a recent publication, "Drafting of Trusts and Will Trusts in Singapore", a Singapore edition of the acclaimed English work titled "Drafting of Trusts and Will Trusts" by James Kessler Q.C., now in its 8<sup>th</sup> edition. Mr Lee has also from time to time contributed articles in financial journals on topics relating to wealth management, succession and trusts. He has also regularly been invited to speak at seminars and conferences concerning such topics.

**REGISTRATION FORM**

Name (Dr/Mr/Mrs/Miss/Mdm): \_\_\_\_\_

Name and Address of Organisation: \_\_\_\_\_

STEP Membership No: \_\_\_\_\_ Position in Organisation: \_\_\_\_\_

Tel number: \_\_\_\_\_ Fax number: \_\_\_\_\_ Email: \_\_\_\_\_

(A valid email address is required for confirmation of registration.)

MEMBERSHIP (Please circle as appropriate.)	FEES
Members of STEP, CPA Australia, International Fiscal Association (IFA), International Tax Planning Association (ITPA), Law Society of Singapore & Singapore Corporate Counsel Association (SCCA), Singapore Trustees Association (STA), Singapore Association of the Institute of Chartered Secretaries and Administrators (SAICSA)	<b>S\$40.00</b>
Others	<b>S\$80.00</b>

☐ STEP Member ☐ CPA Australia Member ☐ IFA Member ☐ ITPA Member ☐ Law Society Member

☐ SAICSA Member ☐ SCCA Member ☐ STA Member ☐ Others

Mode of payment: ☐ Cheque ☐ Telegraphic Transfer

**Telegraphic Transfer Details:**

Account Name: STEP (Singapore Chapter)

Account Number: 048-017070-6

SWIFT code: DBSSGSG

Bank Details: DBS Bank

Address: Raffles Place Branch, 22 Malacca Street, #01-00 Royal Brothers Building, Singapore 048980.

Please email [secretariat@step.org.sg](mailto:secretariat@step.org.sg) after the T/T has been done for our follow-up with the bank. Registration fees must be received nett of all bank charges.

**Cheque Details:**

Cheque payments should be made payable to "STEP (Singapore Chapter)" & arrive at our office at "77A Boat Quay Singapore 048965" with the completed registration form on or before the closing date, **Tuesday, 30 October 2007.**

For further enquiries, please contact: STEP (SINGAPORE) SECRETARIAT

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E-mail: [secretariat@step.org.sg](mailto:secretariat@step.org.sg)

Website: [www.step.org.sg](http://www.step.org.sg)

**REGISTRATION, REFUND & CANCELLATION POLICY**

1. Registrations will be confirmed upon receipt of full payment accompanied by a duly completed registration form.

2. The Organisers reserve the right to refuse to register or admit any participant, and to cancel or postpone the course.

3. Equivalent substitute delegates are welcomed, subject to the Organisers being notified at least 2 working days before the course of the substitute delegate.

4. The Organisers will not entertain any request for a refund of fees. However a confirmed registrant who has paid in full the course fees but does not turn up for the course will be entitled to collect a set of the materials provided.