

# UPDATE ON UK AND INTERNATIONAL TRUST LAW AND TAXATION

FTSE Room, Level 9, Capital Tower, 168 Robinson Road, Singapore  
23 July 2007 (Monday) • 5.15-8.00pm

## Seminar Programme

5.15-5.30pm	<b>Registrations &amp; Refreshments</b>
5.30-5.45pm	<b>Opening Remarks &amp; Overview by Chairperson:</b> <i>Mr. William Lexmond - President, STEP Singapore</i>
5.45-7.15pm	<b>Update on UK and International Trust Law and Taxation</b> <ol style="list-style-type: none"> <li>1. The impact on the future of trusts for tax planning and asset protection following the changes in the UK's 2006 Budget</li> <li>2. Alternatives to "ordinary" family trusts, such as employee trusts, unapproved pensions and collective investment schemes</li> <li>3. An update on recent UK and International trust and company law cases relevant to offshore trustees</li> <li>4. The latest news on tax and legal issues of owning UK land by non resident individuals, companies and trusts</li> <li>5. Taxation issues generally for UK resident beneficiaries/settlers of international trusts</li> <li>6. Update on recent case law regarding domicile and, in particular, residency</li> <li>7. The new aggressive regulatory environment - initiatives by the international community, the EU and Her Majesty's Revenue &amp; Customs</li> <li>8. International Tax Planning - the role of Singapore and other "non haven" jurisdictions</li> <li>9. The increasing role of the EU Treaty in international tax planning</li> </ol>
	<i>Mr. James Quarmby ATT, TEP, Solicitor - Partner and Head of International Taxation, Thomas Eggar, United Kingdom</i>
7.15-7.30pm	<b>Q&amp;A Session &amp; Closing Remarks</b>
7.30-8.00pm	<b>Networking Break</b>

## About the Chairperson

**Mr. Bill Lexmond - Regional Head of Wealth Planning, UBS AG; President, STEP Singapore**

Bill Lexmond is the Regional Head 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 Speaker

**Mr. James Quarmby ATT, TEP, Solicitor - Partner and Head of International Taxation, Thomas Eggar, United Kingdom**

James' work ranges from the creation of family trusts offshore through to constructing complex cross border trading structures. His innovative approach to tax planning has been recognised by the profession; for instance, the Legal 500 describes him as a "very experienced tax lawyer with commendable professionalism and responsiveness who specialises in innovative tax planning work". James also advises on UK and International trust law and specialises in particular in trust reconstructions, disputes and Inland Revenue investigations. As well as being a member of STEP (since 1997) James is a member of The Association of Tax Technicians, The Offshore Institute and The International Tax Planning Association. James also holds a diploma in International Tax Planning.

## 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, International Fiscal Association (IFA), International Tax Planning Association (ITPA), Law Society of Singapore & Singapore Corporate Counsel Association (SCCA), STA (Singapore Trustees Association)	<b>S\$30.00</b>
Others	<b>S\$60.00</b>

☐ STEP Member ☐ IFA Member ☐ ITPA Member ☐ Law Society 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 049865" with the completed registration form on or before the closing date, **Monday, 16 July 2007.**

For further enquiries, please contact:

**STEP (SINGAPORE) SECRETARIAT**

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### 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.