7th PRIVATE BANKING SUMMIT
NAVIGATING THROUGH TURBULENT TIMES

2nd to 4th September 2008 | Renaissance Zurich Hotel, Zurich-Glattpark

KEYNOTE SPEAKERS

DR. EUGEN HALTINER, Chairman, Swiss Federal Banking Commission, Berne

CHRIS M. MEARES, CEO Group Private Banking, HSBC Group, London

JOACHIM H. STRAEHLE, CEO Bank Sarasin & Cie AG, Basel

RAOUL WEIL, Chairman and CEO Global Wealth Management & Business Banking, UBS, Zurich

CONFIRMED SPEAKERS AND PANELISTS

DR. THOMAS BAECHTOLD, Executive Vice President, Pictet Family Office, Pictet & Cie., Zurich

ANNE-MARIE DE WECK, Managing Partner, Lombard Odier Darier Hentsch & Cie, Geneva

MARK EVANS, Head of Family Business and Philanthropy, Coutts & Co., London

BANK JULIUS BAER & CO. LTD., ZURICH
BANK SYZ & CO AG, ZURICH
B-SOURCE, LUGANO
CLARIDEN LEU LTD., ZURICH
EFG INTERNATIONAL, ZURICH
MSR CONSULTING, COLOGNE
ROYAL BANK OF SCOTLAND, ZURICH
SAXO BANK A/S, HELLERUP
SWITZERBANK.COM, ZURICH

ROBERT PARKER, Vice Chairman Asset Management, Credit Suisse, London

L. JACK STALEY, President of Stanford Group (Suisse) AG and Head of the European region for Stanford Zurich, Zurich

PETER VERBAAS, Managing Director International Private Banking, Van Lanschot Bankiers S.A., Utrecht

MODERATOR

DAVID BAIN, Financial News, Dow Jones, London

BRIGITTE STREBEL, Independent Financial Editor and Consultant, Wettswil

CHAIRMAN

PROF. TEODORO D. COCCA
Johannes Kepler University, Linz

POST-CONFERENCE DAY

4th September 2008

CONFIRMED SPEAKERS AND PANELISTS

KONRAD K. HAEUPTLI, CEO, HSBC Guyerzeller Trust Company AG, Zurich

NICHOLAS JACOB, Partner, Lawrence Graham LLP, London

DR. DANIEL LEHMANN, Associate, Shearman & Sterling LLP, Mannheim

DR. HUBERTUS LUDWIG, Partner, VISCHER Attorneys at Law, Basel

PHILIP MARCOVICI, Partner, Baker & McKenzie, Zurich

JEAN-MARC TIRARD, Partner, Tirard Naudin société d’avocats, Paris

DR. NEDIM PETER VOGT, Partner and Head of Private Clients, Baer & Karrer, Zurich

CHAIRMAN

TIM URQUHART
Chairman, STEP Switzerland and Liechtenstein Branch, Zurich

Knowledge partner of the Post-Conference Day: STEP SWITZERLAND AND LIECHTENSTEIN BRANCH

FOR MORE INFORMATION VISIT WWW.PRIVATE-BANKING-SUMMIT.COM OR CALL +41–43–444 78 72

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NAVIGATING THROUGH TURBULENT TIMES

A matter of trust

Yesterday a goldilocks environment and record profits, today one of the worst crises in decades. Starting with the involvement of Wall Street investment banking in the US mortgage sector, the global banking industry has since been undergoing an extremely rocky time.

The Private Banking sector might be one of the more stable units within the business. Nonetheless the challenges have mounted rapidly even there: when financial markets turn shaky, unstable business models and unwisely constructed and intransparent financial products are unmasked and clients increasingly ask tough questions. The volatile financial markets and a weak dollar put profitability under pressure. But that is not everything: Mistrust among the banks, long thought a phenomenon of the past, has resurged. Following this, clients’ trust in their bank has, in some cases, been shaken. Data problems relating to the activities of both the German tax authorities and the German secret service do not help and raise, in turn, questions of trust between the banks and their employees.

What are the answers on a strategic and management level? How can the challenges be turned into long term success factors? Take the opportunity to discuss these topics with international leaders from the Private Banking Business, Swiss regulatory authorities, top lawyers and consultants. The post conference day also puts the spotlight on the instrument trust, an up and coming feature within the continental European Private Banking landscape.

We cordially invite you to join our Private Banking Summit 2008.

Yours sincerely

Claudia Gabriel
Editor-in-Chief, Schweizer Bank

François Schaller
Editor-in-Chief, Private Banking

Agenda PRIVATE BANKING SUMMIT 2008

- The relevance of traditional values in the private banking industry
- Sustainability: niche or mega trend?
- Client-centricity
- On- and offshore strategies
- Positioning in global markets
- Expansion vs. consolidation in private banking
- Differentiation in private banking

Agenda Post-Conference Day TRUSTS

- Relevance of trusts for family offices in Switzerland and the European context
- Trust planning
- Different legislative approaches
- Open questions concerning the fiscal aspects
- Various consequences of different solutions

www.private-banking-summit.com
Nicholas Jacob, Partner, Lawrence Graham LLP, London

Dr. Rolf P. Jetzer, Member of the Boards, Julius Baer Holding Ltd. and Bank Julius Baer & Co. Ltd., Zurich

Michael Kullmann, Partner, MSR Consulting, Cologne

Dr. Daniel Lehmann, Associate, Shearman & Sterling LLP, Mannheim

Adrian Leuenberger, Member of the Executive Board, Clariden Leu Ltd., Zurich

Jean-Louis Lovisa, Executive Vice President, Head of Private Banking Bank SYZ & CO AG, Zurich

Dr. Hubertus Ludwig, Partner, VISCHER Attorneys at Law, Basel

Philip Marcovici, Partner, Baker & McKenzie, Zurich

Chris M. Meares, CEO Group Private Banking, HSBC Group, London

Robert Parker, Vice Chairman Asset Management, Credit Suisse, London

Dr. Juergen Pulm, Chief Operating Officer, Royal Bank of Scotland, Zurich

Kurt Spirig, Member of the General Management, B-Source, Lugano

L. Jack Staley, President of Stanford Group (Suisse) AG and Head of the European region for Stanford Zurich, Zurich

Joachim H. Straehle, CEO Bank Sarasin & Cie AG, Basel

Brigitte Strebel, Brigitte Strebel GmbH, Independent Financial Editor and Consultant, Wettswil

Jean-Marc Tirard, Partner, Tirard Naudin société d’avocats, Paris

Tim Urquhart, Chairman, STEP Switzerland and Liechtenstein Branch, Zurich

Peter Verbaas, Managing Director International Private Banking, Van Lanschot Bankiers S.A., Utrecht

Dr. Nedim Peter Vogt, Partner and Head of Private Clients, Baer & Karrer, Zurich

Raoul Weil, Chairman and CEO Global Wealth Management & Business Banking, UBS, Zurich

Jacob Wester, Director, Head of Private Wealth Management (Europe), Saxo Bank A/S, Hellerup

For more detailed information about speakers, panelists and chairmen please visit www.private-banking-summit.com

For further information please contact +41–43–444 78 72

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e-mail: barbara.kuehne@euroforum.ch

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<td>8.30</td>
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<td>9.00</td>
<td>Welcome and introduction of the conference theme</td>
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<td>9.00</td>
<td>Prof. Teodoro D. Cocca, Chair for Wealth and Asset Management, Johannes Kepler University, Linz</td>
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<tr>
<td>9.30</td>
<td>The outlook for global capital markets and the implication for the private banking industry</td>
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<td>Robert Parker, Vice Chairman Asset Management, Credit Suisse, London</td>
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<td>10.00</td>
<td>The importance of traditional values in private wealth management</td>
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<td>10.00</td>
<td>Tradition, quality and autonomy are the most important elements of a sustainable identity – internally and externally</td>
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<td>How to evaluate, develop and maintain those valuable elements?</td>
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<td>Dr. Rolf P. Jetzer, Member of the Boards, Julius Baer Holding Ltd. and Bank Julius Baer &amp; Co Ltd., Zurich</td>
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<td>Client-centricity in private banking – buzzword or of economic interest</td>
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<td>Rationale to put the client into the center of private banking and how we define a client-centric management approach</td>
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<td>How does a systematic client-centricity-program look like?</td>
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<td>Learnings at Bank Sarasin and indicators of success</td>
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<td>About the challenges an the role of a watchdog</td>
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<td>The recent turbulences in the financial markets question</td>
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<td>the capabilities of a supervisory authority</td>
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<td>FINMA, the Swiss answer, will become an integrated supervisor</td>
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<td>Can FINMA meet the expectations?</td>
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<td>What is the mandate and what are the credentials of a watchdog?</td>
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<td>Dr. Eugen Haltiner, Chairman, Swiss Federal Banking</td>
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<td>Commission, Berne</td>
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<td>14.00</td>
<td>Conquering markets with a new business model</td>
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<td>Tracking performance</td>
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<td>Results and outlook</td>
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<td>Jean Pierre Cuoni, Chairman of the Board, EFG International, Zurich</td>
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<td>How to improve the cost-income ratio in a global private bank?</td>
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<td>Achieving long-term improvements</td>
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<td>Chris M. Meares, CEO Group Private Banking, HSBC Group, London</td>
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Tuesday, 2nd September 2008

ERI Bancaire SA cordially invites you to the lunch.
Tuesday, 2nd September 2008

15.45
Modern and independent wealth management
- New players, new schemes in the private banking industry
- How to combine online private banking with the traditional way of private banking
  Jacob Wester, Director, Head of Private Wealth Management (Europe), Saxo Bank A/S, Hellerup

16.15
Positioning in a global market
- Critical mass: The importance of size in the global competition for market share
- Consolidation: From planning to realization: The first 500 days of Clariden Leu, case study
- Attractive opportunities for growth
  Adrian Leuenberger, Member of the Executive Board, Clariden Leu Ltd., Zurich

16.45
Questions/discussion

17.00
Panel discussion
The challenges for the private banking industry in an economic downturn
  Moderation:
  David Bain, Financial News, Dow Jones, London
  Participants:
  Adrian Leuenberger
  Robert Parker
  Dr. Juergen Plum, COO Royal Bank of Scotland, Zurich
  Kurt Spirig, Member of the General Management, B-Source, Lugano

17.45
Summary and conclusion of the first conference day, followed by a networking reception
EUROFORUM invites you to the reception at the conclusion of the conference day. Take advantage of the opportunity to compare experiences with speakers and delegates.

Albert Reichmuth Inc invites you to a wine-tasting

19.15
Welcome reception for the gala dinner
Hewlett-Packard invites you to the Gala Dinner at The Dolder Grand, Kurhausstrasse 65, 8032 Zurich

Wednesday, 3rd September 2008

8.30
Reception with coffee, tea and croissants

9.00
Welcome and introduction
  Prof. Teodoro D. Cocca

NICHE MARKET STRATEGIES

9.15
Wealth management – more than just financial matter
- What do wealthy clients care about?
- How can a company differentiate itself?
- Trends in social responsibility/philanthropy
  L. Jack Staley, President of Stanford Group (Suisse) AG and head of the European region for Stanford Zurich, Zurich

9.45
The art of private wealth management at F. van Lanschot Bankiers – how one of the eldest private banks in the world differentiates itself from competition
- Overview and control of your wealth
- Boutique funds as an essential part of the investment portfolio
- How do we achieve absolute return?
- Recent developments in the Dutch wealth management market and the rise of the family office industry in the Netherlands, a banker’s response
  Peter Verbaas, Managing Director International Private Banking, Van Lanschot Bankiers S.A., Utrecht

10.15
Questions/discussion

10.30
Break (coffee and tea)

11.00
Keynote
Sustainability: niche or mega trend?
- Successful companies and how carefully they handle resources and how quickly they adapt to environmental and social changes
- Growing interest in sustainable investments
- Sustainable investments – one of Bank Sarasin’s key competencies
  Joachim H. Straehle, CEO Bank Sarasin & Cie AG, Basel
### Wednesday, 3rd September 2008

| 11.30  | **Focus on performance: What impact on the way private banks work?**  
|       | - Better informed clients and increased competition from other financial centres put more pressure on Swiss private banks to deliver investments performance  
|       | - New focus on performance significantly changes the way banks manage their clients portfolios  
|       | - After long years of quantitative-based investment strategies, will we finally see a trend towards a more humanist style of portfolio management?  
|       | - A key issue: to avoid conflicts between the interests of the clients and the short term interests of the shareholders  
|       | Jean-Louis Lovisa, Executive Vice President, Head of Private Banking, Bank SYZ & CO AG, Zurich  |
| 12.00  | **A differentiated approach to achieve sustainable results**  
|       | Anne-Marie de Weck, Managing Partner, Lombard Odier Darier Hentsch & Cie, Geneva  |
| 12.30  | **Questions/discussion**  |
| 12.45  | **Lunch**  
|       | ERI Bancaire SA cordially invites you to the lunch  |

### FAMILY OFFICE

| 14.15  | **Why wealthy families choose to have a family office**  
|       | - Why the traditional private banking offer does not always fulfill nowadays needs of ultra high net worth  
|       | - How wealthy families want their assets to be managed  
|       | - New trends and the future in the family office offering  
|       | Dr. Thomas Baechtold, Executive Vice President, Pictet Family Office, Pictet & Cie., Zurich  |
| 14.45  | **Starting the philanthropy conversation with clients**  
|       | - Common excuses for not talking about philanthropy  
|       | - Reasons for getting the philanthropy discussion going  
|       | - Giving the right advice  
|       | Mark Evans, Head of Family Business and Philanthropy, Coutts & Co, London  |

| 15.15  | **Questions/discussion**  |
| 15.30  | **Break (coffee and tea)**  |

### INDUSTRY TRENDS

| 16.00  | **Keynote**  
|       | Wealth management: Industry trends and outlook  
|       | - Short- and long-term trends of the industry  
|       | - Client needs and alignment of service and product offering  
|       | - Successful wealth manager business models  
|       | Raoul Weil, Chairman and CEO Global Wealth Management & Business Banking, UBS, Zurich  |
| 16.30  | **Client acquisition via Internet**  
|       | - Enable the client to select his relationship manager  
|       | - Matchmaking based on interpersonal liking  
|       | - Video portraits of relationship managers  
|       | - Innovative and effektive offshore marketing  
|       | Daniel Isler, Managing Partner, Switzerbank.com, Zurich  |
| 17.00  | **Questions/discussion**  |

| 17.15  | **Panel discussion**  
|       | The future of private banking – a matter of trust  
|       | **M**oderation:  
|       | Brigitte Strebel, Brigitte Strebel GmbH, Independent Financial Editor and Consultant, Wettswil  
|       | **P**articipants:  
|       | Dr. Leo Thomas Schrutt, Head of Wealth Management & Investments, Stanford Group (Suisse) AG, Zurich  
|       | Joachim H. Straehle  
|       | Peter Verbaas  |
| 18.00  | **Summary and conclusion of the second conference day**  
|       | Albert Reichmuth Inc invites you to a wine-tasting  |
Thursday, 4th September 2008

Post-Conference Day

TRUSTS

Switzerland ratified the Hague Trust Convention with an eye to the growing importance of the trust business. A large volume of assets belonging to trusts, or managed in the name of trusts, is held in Switzerland. Therefore, trusts play an important role in the private banking business, especially for family offices. More and more banks have their own trust departments. The post-conference day is devoted to examining the relevance of trusts for family offices in Switzerland and the European context. Experts from countries representing a range of legislative approaches will speak and discuss the issues.

The legal recognition of trusts leads to greater legal security and clarity. But in Switzerland there are still some open questions, especially concerning the fiscal aspects. Another focus of the post-conference day will highlight the various consequences of different solutions. Explore practical examples of the successful strategies of family bankers and lawyers and exchange ideas with top executives.

Knowledge partner:
STEP, Switzerland and Liechtenstein Branch
Baarerstrasse 75, CH-6300 Zug
phone: +41–41–727 05 27, fax: +41–41–727 05 21

The Society of Trust and estate Practitioners (STEP) is the professional body for the trust and estate professions worldwide and currently has over 13’000 members and students.

STEP was founded in 1991 to meet the recognised need for a medium by which trust and estate practitioners could readily communicate with each other and at the same time be identified as a senior practitioners, highly qualified to provide advice in this specialised field. The clear need for such a body is reflected in the steadily growing membership and expanding number of jurisdictions covered. The key to STEP’s success lies in its network of branches. All branches are run by voluntary committees and are responsible for their own educational and social activities.

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<td>Trust planning for very wealthy clients</td>
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<td>Jigsaw of family governance such as constitutions, private trust companies and the avoidance of family disputes</td>
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<td>Nicholas Jacob, Partner, Lawrence Graham LLP, London</td>
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<td>Structuring trust portfolios from a private bank view</td>
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<td>Trusts and Swiss law – understanding the impact of the Hague Convention</td>
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<td>Avoiding trust litigation from a (Swiss) civil law perspective</td>
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<td>Prenuptial agreements</td>
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<td>Divorce law issues effecting trusts</td>
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<td>Matrimonial property law issues</td>
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<td>Forced heirship issues</td>
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<td>Civil law rules against perpetuities</td>
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<td>Dr. Nedim Peter Vogt, Partner and Head of Private Clients, Baer &amp; Karrer, Zurich</td>
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For more information call +41–43–444 78 72
Thursday, 4th September 2008

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<tr>
<th>11.45</th>
<th>Taxation of trusts in Switzerland</th>
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<td>Trust as a tax entity</td>
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<td>The concept of taxation according to the SSK circular letter of August 22, 2007</td>
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<td>Irrevocable/revocable trust – the decisive issue</td>
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<td>The taxation of the irrevocable discretionary trust separates Switzerland</td>
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<td>Dr. Hubertus Ludwig, Partner, VISCHER Attorneys at law, Basel</td>
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**CONQUERING MARKETS**

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<th>Terra incognita – trusts in Germany</th>
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<td>Conflicts between civil law and trusts</td>
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<td>Tax environment for trusts in Germany</td>
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<td>How to prepare for the worst</td>
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<td>Dr. Daniel Lehmann, Associate, Shearman &amp; Sterling LLP, Mannheim</td>
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<td>The favorable treatment of trusts in the French courts</td>
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<td>The tax treatments of trusts vis-à-vis income tax, wealth tax and inheritance and gift tax</td>
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<td>In which circumstances is it appropriate to use a trust with French connections?</td>
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<td>Jean-Marc Tirard, Partner, Tirard Naudin société d’avocats, Paris</td>
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<th>Trusts and the needs of families with Asian connections</th>
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<td>Planning issues and the use of trust in Asia</td>
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<td>Hong Kong and Singapore, and the latent trust needs of families</td>
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<td>Mobility planning and the special long term role of Asia</td>
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<td>Greater China: Understanding the differing needs of wealth owners in Hong Kong, China and Taiwan, and the role of trusts</td>
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<td>Strategic development of trust business from Asia connected wealth owners</td>
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<td>Philip Marcovici, Partner, Baker &amp; McKenzie, Zurich</td>
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<td>Industry forecast – bright or cloudy?</td>
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