



JPC

IAWAM

Key Conferences stage successful launch with Family Office Day in Zurich

Key Trust's conference division, Key Conferences, staged its inaugural event, a Family Office Day, as part of the 5th Private Banking Summit, held in Zurich at the end of August 2006.

Eighty delegates from nineteen countries attended to talk on the theme 'Meeting the needs of ultra high net worth families'. Individual speakers explored succession, governance and wealth preservation.

Key Trust – Brian Clarke involvement

The event was planned by Key Trust's Managing Director **Brian Clarke**, who acted as official "Knowledge Partner" to the conference organisers Euroforum (Swiss based).

Event chairman was Nicholas Dale of HSBC Guyerzeller Bank.

Papers presented were on a wide range of topics that included:

- Maintaining family involvement and control in succession planning
- The benefits of a multi-family family office
- The power of cohesion
- Philanthropy and its significance
- Current client motivation for a family office
- Institutional responses to the segment
- Thought leadership – the family office world in the next decade
- How family firms choose service providers – what they look for and how decisions are made
- Tax and non-tax reasons for trusts for multi-jurisdictional family offices
- Growing opportunities for tax saving and conserving wealth
- The increasing burden of disclosure, and need for an integrated approach to tax planning.

The day also incorporated three discussion sessions.

Future plans

The second partnered event will expand to a 3-day Conference, starting in 2007. → (next page)



Brian Clarke at the Citywealth Zoo Do in May 06



We believe we offer you wealth management of the highest quality. Euromoney agrees.

Please contact Nick Perryman in London on 020 7567 7070 or David Baker in Jersey on 01534 70 1131. www.ubs.com/uk

Wealth Management

You & Us



UBS Wealth Management is a business group of UBS AG which is authorised and regulated by The Financial Services Authority.

Social diary

Thursday 19th October
Citywealth 1st birthday party. De Vigne bar, Mandeville Hotel, W1 (pictured below)



13th December 2006, Citywealth Californ-i-a at Hotel Bel Air, LA with **Robin Leach** as host.

The Citywealth **Magic Circle awards** for Monaco, France, Luxembourg, Republic of Ireland, Switzerland, Jersey, Guernsey, Isle of Man, and UK May 10th 2007. London Zoo. Incorporating the Citywealth Top 100 UK CI and Isle of Man awards.

Key Trust confirmed as sponsor of UK Magic Circle Awards for personality and achievement of the year.

UBS confirmed as sponsor of Jersey Magic Circle Awards for personality and achievement of the year.

Close Trustees confirmed for Switzerland Magic Circle award.



Brian says of the day “The Private Banking Summit was already a well attended conference for European bankers. Naturally we were delighted to have our Family Office programme attached to it as a post-conference day and to have so many delegates attend.

“The quality of the speakers is what matters most particularly in a crowded conference market and to this end we have started discussions with Euroforum with a view to making the Private Banking Summit a three-day event, with the Key Trust Family Office programme as day 2, at the heart of the conference.”

The speakers were:

- Dr Heinz Stadler, CEO of Privatbank IHAG
- Sebastian Dovey, Managing Partner, Scorpio Partnership
- Penny Webb, Managing Partner, Centre for Family Business Excellence
- Philip Marcovici, Partner, Baker & McKenzie
- John Carrell, Partner, Farrer & Co.
- Rupert Ticehurst, Partner, Herbert Smith LLP

About Key Conferences

Key Trust initiated their conference division to create and present knowledge forums for professionals who share the company's ambition to deliver excellence in wealth management and succession services to ultra-high net worth families.

Brian Clarke says: “Our aim is to develop greater understanding and fresh ideas about the real needs of these families by promoting discussion. New ideas will prove essential as the wealth management industry continues to evolve and we hope to kick start that process with these events.

Brian Clarke at Key Trust entertained the speakers at a private dinner on the eve of the Family Office Day. Guests included John Carrell of Farrer & Co, Samuel Dubno of EuroForum, Rupert Ticehurst of Herbert Smith LLP

For any information contact
brian.clarke@key-trust.com