



LIECHTENSTEIN TRUST CONFERENCE 2018

CONFERENCE

TUESDAY, 13 MARCH 2018

Chair of Company, Foundation and Trust Law

Institute for Business Law

**Role of Discretionary Beneficiaries, Freedom of
Establishment, Sham Trusts and Trust Courts in
Civil Law Jurisdictions**

The Liechtenstein Trust Conference is sponsored by:



Editorial

Trusts continue to garner increased attention worldwide due to their flexibility, proven use in family situations and especially for private wealth protection and philanthropy. Thus the trust concept is currently experiencing a surge in popularity around the globe. It is now increasingly being used outside of its traditional environment, i.e. in a number of civil law jurisdictions. In order to keep pace with such demand, a number of countries have introduced new legislation and/or amendments to existing law.

This year's conference will begin with a discussion on the information rights of discretionary beneficiaries and their rights to request a court review. *Paul Matthews* will give his keynote speech on this issue starting from the English Law of Trusts. Then *Stefan Wenaweser* will analyse the recent findings of Liechtenstein Courts on the rights of discretionary beneficiaries and their rights to request a court review.

After that *Thomas Zwiefelhofer* will focus on the Freedom of Establishment and will show how Liechtenstein Trusts benefit from the recent case law of the European Court of Justice and the EFTA Court.

In the following conference session *Maurizio Lupoi* will discuss conditions under which courts may consider a trust to be a sham or otherwise void. This session will deal with the San Marino as well as the Liechtenstein perspective.

The final panel discussion will deal with Special Trust Courts in Civil Law Jurisdictions and will answer the question whether San Marino can be a role model for Liechtenstein.

The conference presentations will be given by internationally renowned practitioners and academics, and participants will have sufficient opportunity to raise questions after the presentations and to participate in the closing panel discussion. The entire conference will be conducted in English.

On behalf of the Chair of Company, Foundation and Trust Law at the Institute for Business Law, University of Liechtenstein, I cordially invite you to the Liechtenstein Trust Conference on 'Role of Discretionary Beneficiaries, Freedom of Establishment, Sham Trusts and Trust Courts in Civil Law Jurisdictions' on 13 March 2018.

Vaduz, February 2018

Prof Francesco A Schurr

Programme: Tuesday, 13 March 2018

12.30pm Registration with drinks and sandwiches

1.20pm Prof *Francesco A Schurr*, Head of the Institute for Business Law and Chair of Company, Foundation and Trust Law, University of Liechtenstein, Vaduz, Liechtenstein

Introduction

Presentations

1.30pm Prof *Paul Matthews*, LLB (UCL), BCL (Oxford), LLD (London), Visiting Professor at the Dickson Poon School of Law, King's College, University of London; Deputy Chairman of the Trust Law Committee; and Specialist Chancery Circuit Judge, Bristol, United Kingdom

Information rights of discretionary beneficiaries and their rights to request a court review

2.10pm Dr *Stefan Wenaweser*, LL.M., Partner, Marxer & Partner Rechtsanwälte, Vaduz, Liechtenstein

A critical analysis of the recent Liechtenstein case law on the rights of discretionary beneficiaries from the perspective of a practitioner

2.40pm **Discussion**

3.00pm Dr *Thomas Zwiefelhofer*, dipl Arch ETH, Dr iur HSG, Member of the Group Board, First Advisory Group, Vaduz, Liechtenstein; Former Minister of Justice, Home Affairs and Economic Affairs

Recent developments with respect of the Freedom of Establishment and the recognition of Trusts

3.15pm **Discussion**

3.45pm C o f f e e b r e a k

Presentations

4.15pm Prof *Maurizio Lupoi*, Emeritus Professor at the University of Genoa, President of the "Il trust in Italia" association and President of the Corte dei Trust di San Marino

Sham Trusts in a Civil Law Trust Court

5.00pm Prof *Francesco A Schurr*, Head of the Institute for Business Law and Chair of Company, Foundation and Trust Law, University of Liechtenstein, Vaduz, Liechtenstein

Sham Trusts from a Liechtenstein perspective

5.30pm **Discussion**

Panel Discussion: Trust Courts in Civil Law Jurisdictions – San Marino as a role model for Liechtenstein?

5.45pm Moderation: *Francesco A Schurr*

Panel participants: *Paul Matthews, Stefan Wenaweser, Thomas Zwiefelhofer and Maurizio Lupoi*

Closing Remarks

6.30pm A p e r i t i f a n d e x c h a n g i n g t h o u g h t s

General Information

Participants

Lawyers, trustees, judges, public prosecutors, employees of banks, insurance companies and financial service providers, legal academics as well as anyone interested in trust law.

Venue

University of Liechtenstein
Fürst-Franz-Josef-Strasse
9490 Vaduz
Liechtenstein

Time

Tuesday, 13 March 2018
12.30pm-6.30pm

Fee

410.00 Swiss francs per person incl. conference materials, a certificate of participation, sandwiches and an aperitif.

Registration

You can register online (www.uni.li/trustconference) or by fax +423 265 11 12. On registration, you will be required to pay the participation fee. Substitute participants will be accepted without additional costs.

The conference will be conducted in English.

Deadline

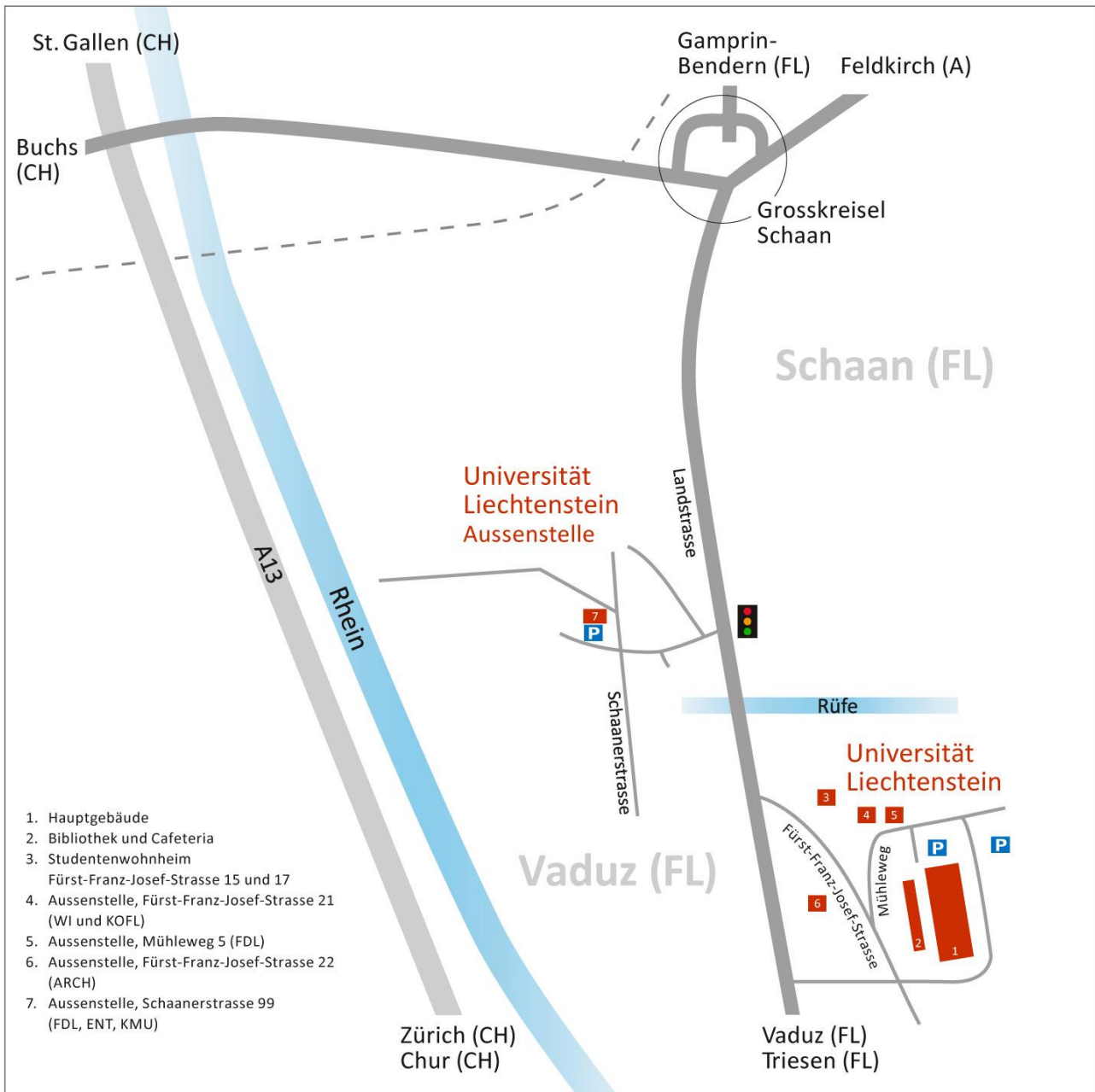
Tuesday, 6 March 2018

Further Information

If you require any further information, please contact Mr lic iur Frederique Lambrecht, LL.M and Ms Beatrice Kaiser
Institute for Business Law. Tel: +423 265 11 90.

www.uni.li/trustconference

Directions



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