

## Association STEP Geneva - Office of the Secretary

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**Thursday, January 18<sup>th</sup>, 2024 – ONLINE EVENT**

Our next and last in 2023 event will be held on **Thursday, January 18<sup>th</sup>, 2024** online: the link will be sent to those registered **one day before the event**. The Event starts **at 14:00** and will last for about an hour.

Ours speakers of the day will be:

**Caroline Bennett-Akkaya** – *Sales Partner at 1291 Group.*

**Klemens R. Zeller**- *Executive Director, Wealth Advisor at JP Morgan, Geneva.*

**Danilo Santucci** – *Partner at Nutter.*

The Event will be in **English** on the topic:

### **WHEN SHOULD YOU CONSIDER A STANDALONE LIFE INSURANCE PRODUCT OR ONE WITHIN A TRUST STRUCTURE?**



**Caroline Bennett-Akkaya** is a sales partner at 1291 Group, an advisory/brokerage firm headquarter in Zurich and focused on wealth planning using life insurance solutions. TEP qualified, she spent 14 years in the UK in a corporate service and then trust company prior to moving to Switzerland in 2009.

Caroline subsequently worked as a Business Developer and Client Director across many models of Trust businesses (bank and asset manager-owned and

Channel-Islands listed).

In 2020 she joined 1291 Group to help establish the Geneva presence. They work with UHMW families and their advisors/trustees to advise on life insurance solutions for their long-term succession plans.



**Danilo (“Dani”) Santucci** is a partner in in the Private Client Department of Nutter, McClennen & Fish LLP in Boston, Massachusetts. He focuses his practice on advising high net worth individuals and families on their estate and tax planning needs, both domestic and international.

Dani counsels high net worth clients, trustees, and their advisers on achieving their succession and investment goals through a range of tax-efficient techniques. On the domestic side, Dani has extensive experience advising clients on sophisticated gifting techniques, insurance planning, and planning with family investment entities. Dani’s cross-border practice includes pre-immigration planning and advising cross-border families on tax and trust law issues related to their U.S. connections.

Dani teaches a course on international estate planning at Boston University School of Law and has published extensively on foreign trusts and other topics related to cross-border estate planning. He is fluent in Italian and a member of the Society of Trust and Estate Practitioners.

Prior to joining Nutter, Dani practiced in the Private Client Group of an international law firm. Previously, he was Senior U.S. Tax Counsel and Wealth Planner at an insurance company in Luxembourg and an associate in the international tax and wealth management practices in the Swiss offices of an international law firm.



**Klemens R. Zeller** is a wealth advisory professional with over 20 years of experience in advising global UHNW families.

He is skilled in business development activities with expertise in wealth preservation and wealth structuring, integrated wealth transfer solutions, governance, fiduciary planning and tax optimization strategies in a multi-jurisdictional context.

Having worked at several global financial institutions in Zurich, Nassau (Bahamas), New York and Miami, he is presently based in Geneva. He is fluent in English, German and Spanish and has basic knowledge in French and Portuguese.

Mr. Zeller earned a bachelor’s degree in business administration from the KV Zurich Business School in Zurich in 1997 and became a Certified Financial Planner (CFP®) in 2003. He is a registered Trust and Estate Practitioner (TEP) with the Society of Trust and Estate Practitioners and a member of the Financial Planning Association (FPA), International Fiscal Association (IFA), International Wealth Planners (IWP) and Family Firm Institute (FFI).

Mr. Zeller regularly speaks at international trust and estate planning conferences on a variety of topics.

## Registration:

To register please go to our website: <http://www.step-geneva.org> (click on “STEP events”, select the event and click “Register online” - this will redirect you to Infomaniak.com, where you can register and pay immediately either by credit card (except AMEX) or by bank transfer (click “invoice/facture”). Afterwards, you will receive a confirmation email including bank details if you choose to pay by bank transfer.

Price of the ONLINE event is **CHF 25** for STEP members (**CHF 35** for non-members and **CHF 15** for STEP Diploma Student) payable in advance by credit card or transfer to our UBS bank account:

*Association STEP Geneva  
Bank: UBS S.A., Geneva,  
Account n° 0240-615299,  
IBAN CH19 0024 0240 6152 9901H  
BIC UBSWCHZH80A).*

Registrations and payment must be received at least 48 hours before the event. Anyone who does not register 48 hours in advance may see their registration cancelled should the Hotel not be able to accommodate numbers. Because STEP is liable for reservations made, “no shows” will be required to pay. Cancellations in writing must be received by the Secretariat at least 72 hours before the event.

**This event counts as “1 structured CPD hour”.**

If you have any queries on registration, please send an email to Larisa Udalyagina (STEP Geneva Secretariat) at [secretariat@step-geneva.org](mailto:secretariat@step-geneva.org) and she will help you with your registration.

**For more on upcoming events in Geneva, please visit the website at [www.step-geneva.org](http://www.step-geneva.org), for Lausanne: [www.step-lausanne.org](http://www.step-lausanne.org) and for Verein branches: [www.step-ch-fl.com](http://www.step-ch-fl.com)**

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