

Association STEP Geneva - Office of the Secretary

—
Thursday, July 6th, 2023 – ONLINE EVENT

Our next event will be held on **Thursday, July 6, 2023** 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 **Jessica Henson - Partner, Litigation, arbitration & dispute resolution at Payne Hicks Beach, Richard Wilson KC – Barrister, Serle Court Chambers, UK , Richard Grasby - Partner in Appleby's Hong Kong office.**

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

SUMMER TIPS FOR TRUSTEES: REVIEWING FILES? MEETING FAMILIES?
WE WILL DISCUSS SOME OF THE ISSUES WHICH MAY REQUIRE ATTENTION,
ESPECIALLY IN THE LIGHT OF RECENT JUDGEMENTS.

Jessica Henson is a private client partner specialising in risk and disputes in relation to trusts and estates.

Jessica has accrued extensive trust litigation experience both in England and offshore. Her cases have included both seeking and defending the removal of trustees, protectors and executors; rectification and variation of trusts; setting aside and defending trusts on the basis of sham allegations; challenging trustees' decisions and advising trustees on making decisions in contentious circumstances; challenging trustees' fees; claims for breach of fiduciary duty; and associated professional negligence proceedings against tax and legal advisors.

Equally, Jessica frequently advises on probate and estate disputes, including invalidity claims, capacity and construction issues, as well as claims under the Inheritance (Provision for Family and Dependents) Act 1975.

Jessica has also built up particular expertise in advising trustees and beneficiaries on issues of trust law in the context of divorce proceedings – both in relation to proceedings in the Family Division and in the corresponding offshore trust jurisdictions.

Jessica draws on her wealth of litigation experience to inform asset protection and estate planning strategies designed to avoid disputes in the future. For this reason, Jessica is frequently asked to advise on the establishment of trusts, pre and post nuptial agreements and Wills where there are particular risks or asset protection concerns.

Jessica is the co-founder and co-chair of ConTrA (the Contentious Trusts Association) which runs informative seminars and conferences for over 400 members both in the UK and offshore. She is also a regular speaker at other international conferences and frequently lectures on topics surrounding the psychology of litigation.

Having studied Classics at Cambridge University, Jessica trained at Herbert Smith and worked at Berwin Leighton Paisner before joining Payne Hicks Beach.

Qualified September 2011, joined Payne Hicks Beach as a partner 2020.

Richard Wilson KC *has a practice encompassing litigation, drafting and advisory work across a wide range of traditional and commercial chancery, with a strong emphasis on trusts and probate (both contentious and non-contentious), related company and partnership law, claims under the Inheritance (Provision for Family and Dependents) Act 1975, tax, professional negligence and civil fraud.*

Richard has been involved in many of the most significant and high-value cases in those areas in recent years, including: Futter v. Futter [2013] UKSC 26 (the leading case on the Rule in Re Hastings-Bass); Gany v Khan [2018] UKPC 21 (claim to establish ownership of companies by BVI trust and setting aside appointment by trustees); Grand View Private Trust Company v. Wong [2020] Bermuda Court of Appeal (challenge to exercise of trustees' powers on the basis that it destroyed the 'substratum' of the trust) and the Dawson-Damer litigation (high value breach of trust claim in The Bahamas with related litigation in England and Bermuda). He is also currently acting in a number of disputes concerning the estates of UHNWIs in England.

His work frequently involves offshore matters and issues of private international law. He has appeared in the Privy Council, the Supreme Court and Court of Appeal of Gibraltar, the Supreme Court and Court of Appeal of Bermuda, the Supreme Court of The Bahamas, the Grand Court of the Cayman Islands and the Eastern Caribbean Supreme Court and Court of Appeal. He has also given expert evidence of English Law in the Royal Courts of Jersey and Guernsey. He frequently acts in cases in all of the principal offshore jurisdictions including those mentioned above and in an increasing number of cases in Hong Kong.

Before commencing practice at the Bar, Richard worked as a tax consultant with Price Waterhouse.

Richard Grasby is a Partner in Appleby's Hong Kong office, leading the Private Client, Trusts and Family Office practice.

Richard advises trustees, ultra-high net worth individuals, private trust companies and family offices on the establishment, restructuring and administration of trusts, including special trusts i.e. BVI VISTA, Cayman STAR and Employee Benefit Trusts. He regularly assists in estate administration, succession planning and family governance. Private clients and family offices instruct Richard to advise on the use of corporate vehicles for asset holding and succession planning purposes. Richard is an expert in regulatory law including AML, AEOI, economic substance sanctions and licensing and risk management for trust companies. He also advises on collective investment funds, particularly unit trusts and private label funds.

Richard has acted for many of the world's leading trust companies, financial institutions, wealthy individuals and related structures. He has experience with dealing with clients and advisors across the globe.

Richard has over 20 years' post qualification experience with the majority spent in offshore firms. Richard has lived and worked in Jersey, London, the Cayman Islands and (since 2009) Hong Kong. He is admitted as a solicitor in England and Wales and the British Virgin Islands and is a Registered Foreign Lawyer in Hong Kong. He has also been admitted as an Attorney in the Cayman Islands.

Recently, he has been recognised in the 2023 edition of the Private Client Global Elite Directory.

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), 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
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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 and she will help you with your registration.

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