

Private Clients In the Changing World: Where East Meets West

Thursday 10 APRIL 2025

08:30 – 09:00 → **Registration and Morning Coffee**

09:00 – 09:15 → **Opening remarks from the Cyprus Chamber of Commerce and Industry**

09:15 – 09:45

Opening Speeches from Conference Chair(wo)men

Changing political and legal landscape reshapes the geography of centres of both HNWI and their advisors. Wealth goes to where the success is celebrated, and the opportunities are aplenty. Traditional centres are being pushed out by ambitious new entrants.

This conference will address the most recent international hot topics, changes in laws of various countries with a focus on practical takeaways for wealthy families and their advisors.

CHAIR(WO)MEN:

Olga Boltenko-Kroon, Managing Partner
Boltenko Law, Zurich

Stella Kammitisi, Managing Director,
Raza Corporate Services Ltd, Nicosia

Paolo Panico, Managing Director
Private Trustees SA, Luxembourg

09:45 – 11:15

Staying Ahead of the Curve: Dealing with Economic Sanctions, AML, CRS, as well as Financial Markets

As geopolitical risks intensify and a new U.S. Administration is in place, it is important to gain new strategies for quickly adapting to rapid new changes.

This panel will address how HNWI and their advisers can manage economic sanctions risks and compliance requirements, whilst effectively manage wealth and new business ventures.

CHAIR: **Olga Boltenko-Kroon**, Managing Partner
Boltenko Law, Zurich

SPEAKERS:

Gregg Robins, Founder
Robins Advising, Geneva

Melanie Ryan, Partner
Pinsent Masons LLP, London

Richard Sobel, Managing Partner
Altai Capital LLC, New York

Charlie Willcox, CRS/FATCA & Regulatory Advisor
Helm AG, Zurich

Nicky Xenofontos, Managing Partner
N. Xenofontos LLC, Nicosia – STEP
Cyprus Chairwoman

11:15 – 11:45 → **Coffee Break**

11:45 – 13:00

International Relocations: Immigration and Tax

Relocation has never been such an important topic. For many reasons, high net worth clients are deciding to move to other jurisdictions, and in doing so often seek out low tax regimes. As a result, their home countries are likely to challenge the legitimacy of the move.

How best can our clients be prepared to meet, and defeat, such challenges? What are best practices to establish, and defend, a new tax residency? In addressing these questions, we will ask our speakers to discuss current trends and practical lessons learned from cases they have encountered.

CHAIR: Stella Kammitisi, Managing Director, Raza Corporate Services Ltd, Nicosia

SPEAKERS:

Svetlana Colta, Founder & CEO
Carré Trust AG, Zurich

George Economides, Partner
E&G Economides LLC., Limassol

Theodoros Skouzos, Managing Partner
Advocate LL.B, LL.M., Athens

Elena Vasilyeva, Senior Counsel
Charles Russell Speechlys LLP, Dubai

13:00 – 14:00 → **Networking Lunch**

14:00 – 15:00

HNWI in 2025: Political Uncertainty, Change of Legal and Tax Regimes

Fiscal policies and geopolitical pressures in Europe and Middle East have affected how UHNW families protect their current wealth and their legacies for future generations.

Please join us for and global update on what concerns our clients, the impact of new taxes or tax transparency, where families are moving to, and how family offices or related structures play into their planning decisions.

CHAIR: Paolo Panico, Managing Director
Private Trustees SA, Luxembourg

SPEAKERS:

Katrina Robinson, CEO
Cone Marshall Group, New York

Judith Taic, Director
Dr. Judith Taic Law Office, Tel Aviv

Carine Tohme, Managing Partner
Tohme Law Firm, Beirut

15:00 – 16:00

Case Study: Inheritance, Wills and Probate

While families might think that they have come up with a perfect structure to manage succession and governance of family assets, the structures are often flawed, being a result of a compromise between a web of multijurisdictional inheritance and tax laws, as well as of practical family circumstances and considerations.

This panel will examine practical consequences of inheritance by looking at a case study. Elena is married and has 4 children. She has businesses and real estate

CHAIR: Evgenia Martin, Counsel,
Boltenko Law, Zurich

SPEAKERS:

Toby Graham, Partner
Farrer & Co LLP, London

Stella Kammitisi, Managing Director,
Raza Corporate Services Ltd, Nicosia

David Russell KC, Barrister at Law
Outer Temple Chambers, Dubai

assets in the UK, Cyprus, Luxembourg and Russia, as well as bankable assets in Switzerland, Monaco and UAE. She has passports of the UK, Israel and Cyprus. Elena, her new handsome Cypriot husband and the youngest daughter are based in Cyprus. As the older children are resident in the UK, Switzerland and UAE, Elena is trying to persuade her husband to move to one of those jurisdictions. What should she do to plan her taxation and succession?

16:00 – 16:30 → **Coffee Break**

16:30 - 17:30

Discussion Panel: Where We are Now and What is Next **ALL SPEAKERS**

This closing panel will zoom in on practical takeaways from the conference by focusing on pragmatic strategies for HNWI and their advisors for year 2025 and beyond.

17:30 - 17:45 → **Closing Remarks by the Chair(wo)men**

17:45 – 20:00 → **Cocktail Reception**
