

# Private Clients In the Changing World: Where East Meets West

Thursday 10 APRIL 2025

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

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

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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**

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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**

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11:15 – 11:45 → **Coffee Break**

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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  
**Iason Skouzos TaxLaw, Athens**

**Elena Vasilyeva**, Senior Counsel  
**Charles Russell Speechlys LLP, Dubai**

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13:00 – 14:00 → **Networking Lunch**

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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:**

**Maurizio Cohen**, Founding Partner  
**Interlaw Monaco, Monaco**

**Bruno Fuchs**, Special Advisor  
**Cone Marshall Swiss Trustees, Zurich**

**Kelly Greig**, Partner  
**Blick Rothenberg Limited, London**

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

**Carine Tohme**, Managing Partner  
**Tohme Law Firm, Beirut**

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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

**CHAIR:** Evgenia Martin, Counsel,  
**Boltenko Law, Zurich**

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 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?

#### **SPEAKERS:**

**Toby Graham**, Partner  
**Farrer & Co LLP, London**

**Stella Kamnitsi**, Managing Director,  
**Raza Corporate Services Ltd, Nicosia**

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

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16:00 – 16:30 → **Coffee Break**

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16:30 - 17:30

#### **Leaders' Insights: Where We are Now and What is Next**

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.

- Geopolitics: trends & implications
- Evolving attitudes to wealth
- Biggest challenges of 2025 & beyond
- AI vs. Humans
- Structuring solutions: theory & practice

#### **SPEAKERS:**

**Olga Boltenko-Kroon, Svetlana Colta, George Economides, Bruno Fuchs, Toby Graham, Stella Kamnitsi, Paolo Panico, Gregg Robins, David Russell KC, Melanie Ryan, Theodoros Skouzos, Richard Sobel, Judith Taic, Carine Tohme, Elena Vasilyeva, Charlie Willcox, Nicky Xenofontos**

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

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

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