



the global voice of  
the legal profession®



Follow us  
[@IBAEvents](#)  
[#IBAClient](#)



INTERNATIONAL BAR ASSOCIATION CONFERENCE 2025

A conference presented by the IBA Private Client Tax Committee  
and supported by the IBA Family Law Committee

# 30th Annual International Private Client Tax Conference: transforming (un)expected challenges into opportunities for the next 30 years

2–4 March 2025, Raffles OWO, London, England

## Working programme

WiFi  
Network: Raffles London  
(no password)

Network security cannot be guaranteed; if you access the wifi network you do so at your own risk in accordance with the provider's terms and conditions. Anyone else connected to this network might be able to intercept your personal data.

Headline  
conference  
sponsors



Schroders  
Wealth Management

All speaker materials and biographies can be found at [www.ibanet.org/conference-details/conf2534](http://www.ibanet.org/conference-details/conf2534)

### Conference Co-Chairs

Anne Guichard *n3t NOTAIRES, Paris; Member, IBA Private Client Tax Committee Advisory Board*

Gerd D Goyvaerts *Tiberghien, Antwerp; Co-Chair, IBA Private Client Tax Committee*

Inbal Faibish Wassmer *Goldfarb Gross Seligman, Zürich; Co-Chair, IBA Private Client Tax Committee*

Percy Castle *DS Avocats, Lima; Senior Vice Chair, IBA Private Client Tax Committee*

## Monday 3 March

**All working sessions will take place in the Whitehall Ballroom**  
**All coffee/tea breaks and lunch will take place in the Lawrence, Morse and Code rooms**

0845 – 0900 **Introduction from the Conference Co-Chairs**

0900 – 1015 **The death of the tax-free regimes: what should we be thinking about instead?**

As well as big shifts in certain local tax regimes, both the EU and the OECD have indicated an appetite to introduce global minimum taxes for individuals. In this panel, we will investigate whether tax-free regimes for individuals are genuinely becoming a thing of the past. Is this a global phenomenon or are certain countries still likely to attract the ultra-wealthy? And how should advisers be preparing their clients for the future?

*Session Co-Chairs*

**Sangna Chauhan** *Charles Russell Speechlys, London; Treasurer, IBA Private Client Tax Committee*

**Carine Tohme** *Tohme Law, Beirut; Vice Chair, IBA Private Client Tax Committee*

*Speakers*

**Nicole Najjar** *Mattos Filho, São Paulo*

**Paolo Mina** *Statura Group, London*

**Fouad Sayegh** *Walder Wyss, Geneva*

1015 – 1100 **Keynote address: The role of the unconscious in you and your clients**

Dr Sam Cleminson will explore the intricate world of the unconscious and its profound influence on our thoughts, feelings and behaviours. Drawing from the fields of depth psychology and philosophy, the talk will challenge conventional thinking, and inspire curiosity and deep reflection, as well help you understand the rich unspoken world of communication between you, your HNWI clients and their families. The insights from this talk will aid you in improving client and personal relationships and achieving more effective mediation and dispute resolutions for these HNWI clients.

*Speaker*

**Dr Samuel Cleminson** *London*

1100 – 1130 **Coffee/tea break**

### MOBILE TELEPHONES

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

### Headline social event sponsors

**Bellecapital**



**Burges  
Salmon**

**Charles  
Russell  
Speechlys**

**CRESTBRIDGE  
FIDUCIARY**  
A US JOINT VENTURE WITH Willow Street



**HEUKING**

**MAISTO E ASSOCIATI**

**walderwyss**

**withersworldwide**  
The law firm for success

# Monday continued

## 1130 – 1245 **Challenging tax residency: is there enough substance in your residence?**

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, i.e. deem them still to be a tax resident. How best may practitioners prepare our clients 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.

### *Session Co-Chairs*

**Sonia Velasco** *Cuatrecasas, Barcelona*

**Rashad Wareh** *Kozusko Harris Duncan, New York*

### *Speakers*

**Rosanne Bonnici** *Fenech & Fenech Advocates, Valetta*

**Gretel Ciniglio de Perez** *Fabrega Molino, Panama; Young Lawyers' Committee Liaison Officer, IBA Private Client Tax Committee*

**Marine Dupas** *Arkwood, Paris*

**Jean-Charles Gardetto** *Gardetto Avocats, Monaco*

**Katharina Hemmen** *Pöllath, Frankfurt*

## 1245 – 1400 **Lunch**

## 1400 – 1515 **Round table session: 30 years of private client planning – what has changed, what went right and what went wrong? Will history repeat itself?**

A dozen former Committee Chairs have seen most of it and will share their insights in this interactive session.

### *Roundtable Co-Chairs*

**Leigh-Alexandra Basha** *McDermott Will & Emery, Washington DC*

**Daniel Simon** *Collyer Bristow, London*

### *Moderators*

**Jerome Assouline** *Sekri, Valentin Zerrouk, Paris; Member, IBA Private Client Tax Committee Advisory Board*

**Olga Boltenko-Kroon** *Boltenko Law, Zürich*

**Anne Guichard** *n3t NOTAIRES, Paris; Member, IBA Private Client Tax Committee Advisory Board*

**Gerd Kostrzewa** *HEUKING, Düsseldorf*

**Mark E Osborne** *Osborne Helman Scott Knisely & Stanton, Austin, Texas; Member, IBA Private Client Tax Committee Advisory Board*

**Edgar H Paltzer** *Paltzer Private Clients Law, Zürich*

**Natalie Peter** *Blum & Grob, Zürich; Member, IBA Private Client Tax Committee Advisory Board*

**Christopher Potter** *Sete, Geneva*

**Niklas Schmidt** *Wolf Theiss, Vienna*

**Catherine Watson Coles** *McInnes Cooper, Halifax, Nova Scotia*

**Rashad Wareh** *Kozusko Harris Duncan, New York*

## 1515 – 1545 **Coffee/tea break**

### **MOBILE TELEPHONES**

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

### **Associate conference sponsor**



### **Conference reception and dinner sponsors**



# Monday continued

---

## 1545 – 1700 **10th anniversary of the EU-regulation on successions**

On 17 August 2015 the European Succession Regulation (Brussels IV) entered into force, creating harmonised conflict of law rules for cross-border successions within the EU and introducing a European Certificate of Succession. Now, almost ten years later, it's time for a thorough evaluation: what works and what doesn't?

*Session Co-Chairs*

**Line-Alexa Glotin** *UGGC Avocats, Paris*

**Dirk-Jan Maasland** *Loyens & Loeff, Amsterdam; Website Officer, IBA Private Client Tax Committee*

*Speakers*

**Domenico Damascelli** *Associate Professor, University of Bologna, Bologna*

**Sandra Gulich-Merrad** *Blum & Grob, Zurich*

**Michael Rutili** *Stephenson Harwood, London; Session Reporters Liaison Officer, IBA Private Client Tax Committee*

## 1900 **30th Anniversary Conference reception and dinner**

*The National Gallery*

*Trafalgar Square London, WC2N 5DN*

Ticket price: £175

One place per registered delegate is permitted.

The National Gallery is a 6-minute walk from Raffles OWO.

### **MOBILE TELEPHONES**

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

Conference refreshment break sponsor



Conference luncheon sponsor



Exhibitor



**All working sessions will take place in the Whitehall Ballroom**  
**All coffee/tea breaks and lunch will take place in the Lawrence, Morse and Code rooms**

---

0800 – 0900 **Breakfast roundtable: Hot topics in your jurisdiction**

- What are the most recent changes in law in your country?
- What are the boiling hot topics in your jurisdiction?
- What is the takeaway that practitioners from other jurisdictions need to remember when hearing of your own jurisdiction?
- What are trends in your office talent search and talent retention strategy?

We had so much fun, let's do it again! Join us for a lively round-table discussion for an exchange of knowledge among participants. The listed facilitators will open the debate, then the floor is yours!

Continental breakfast will be provided.

*Roundtable Co-Chairs*

**Megan R Worrell** *JP Morgan, New York; Diversity and Inclusion Officer, IBA Private Client Tax Committee*

**Markus Zwicky** *Zwicky & Partner, Zug; Scholarship Officer, IBA Private Client Tax Committee*

*Moderators*

**Jack Bernstein** *Aird Berlis, Toronto, Ontario*

**Percy Castle** *DS Avocats, Lima; Senior Vice Chair, IBA Private Client Tax Committee*

**Álvaro Checa Rodríguez** *Kinship Law, Madrid; Latin American Regional Forum Liaison Officer, IBA Private Client Tax Committee*

**Seth Entin** *Greenberg Traurig, Miami, Florida*

**Carlos Gabarro** *Altalex Asesores SL, Barcelona*

**Juan Gonzalez** *Converge Wealth Planning Inc, Miami, Florida*

**Aidan Grant** *Collyer Bristow, London; Publication and Newsletter Editor, IBA Private Client Tax Committee*

**Jake Kaplan** *Baker McKenzie, New York*

**Dina Kapur Sanna** *Day Pitney, New York*

**Jochen Kotzenberg** *Flick Gocke Schaumburg, Bonn*

**Max Kremer** *Arendt & Medernach, Luxembourg*

**Yolanda Lobao** *Ecija Abogados, Barcelona*

**Rachel Mainwaring-Taylor** *MEUM Law, London*

**Marco Ottenwälder** *Andersen Germany GmbH, Frankfurt*

**Stella Strati** *Patrikios Pavlou & Associates, Limassol*

**Emilie Van Goidsenhoven** *Tiberghien, Brussels*

0915 – 1030 **Rich kids part I: Being born in the deep end of the gene pool**

This session will cover the protection, treatment, unification and possible separation of, as well as contingency planning for, soon-to-be affluent young family members.

*Session Co-Chairs*

**Joshua S Rubenstein** *Katten, New York; Vice Chair, IBA Family Law Committee*

**Catherine Watson Coles** *McInnes Cooper, Halifax, Nova Scotia*

*Speakers*

**Alessia Allegretti** *Boies Schiller Flexner, Milan; Membership Officer, IBA Private Client Tax Committee*

**Marianne Kafena** *Mishcon de Reya, London*

**Graeme Perry** *Sete, Geneva*

1030 – 1100 **Coffee/tea break**

**MOBILE TELEPHONES**

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

# Tuesday continued

---

## 1100 – 1215 **Rich kids part II: Fortune, feuds & failure, protecting the family business**

A journey on the swings and roundabouts of family business succession. Our panel will discuss the practical steps advisors can take to prevent the preventable and resolve issues inside and outside the family business unit.

*Session Co-Chairs*

**Jerôme Assouline** *Sekri Valentin Zerrouck, Paris*

**Shawntel Randi** *Nixon Peabody, Boston*

*Speakers*

**Geraldine Appert** *Goldman Sachs, Paris*

**Jeremy Kosky** *Clifford Chance, London*

**Catherine Moore** *Ogier, St Peter Port*

## 1215 – 1345 **Lunch**

## 1345 – 1500 **Trends in Asia**

Fiscal policies and geopolitical pressures have affected how UHNW families protect their current wealth and their legacies for future generations. In Asia, the impact for wealth advisors can be seen in terms of global mobility either into or out of relevant jurisdictions. Please join us for an Asian 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. Our panel has been assembled from leading private client practitioners in jurisdictions stretching from Asia Pacific and the Indian subcontinent all the way to the Middle East.

*Session Co-Chairs*

**Kevin Lee** *Stephenson Harwood, Hong Kong*

**Shreya Rao** *Shreya Rao & Associates, Bangalore, Karnataka*

*Speakers*

**Soo-Jeong Ahn** *Yulchon, Seoul; Scholarship Officer, IBA Taxes Committee*

**David Chee** *WongPartnership, Singapore*

**Hitomi Sakai** *City-Yuwa Partners, Tokyo*

**Sunita Singh-Dalal** *Hourani and Partners, Dubai*

## 1500 – 1530 **Coffee/tea break**

## 1530 – 1645 **From pixels to probate: handling digital assets before and after death**

As our lives become increasingly digital, estate planners and advisors face several challenges in managing everything from cryptocurrency wallets to social media accounts after their clients' deaths. This panel explores the complexities of identifying, valuing, and transferring digital assets, addressing critical questions about their location, taxation, and the emerging legal frameworks that govern them. Join our panel of experts as they navigate the intersection of technology and law, offering practical insights into protecting and preserving digital wealth across generations while examining ongoing efforts to harmonise digital asset treatment across jurisdictions.

*Session Co-Chairs*

**Ruth Bloch-Riemer** *Bär & Karrer, Zurich*

**Niklas Schmidt** *Wolf Theiss, Vienna*

*Speakers*

**Lya Glaentzlin D'Ascoli** *Glaentzlin, Caracas*

**Sara Johnson** *RBC Family Office Services, Kelowna, British Columbia*

**Ben Rosen** *Quastels, London*

## 1645 – 1715 **Open business meeting**

All delegates are invited to join the Committee Officers at an open business meeting to discuss the planning of next year's London conference and other activities of the Private Client Tax Committee.

The IBA, its officers and staff accept no responsibility for any views expressed, presentations or materials produced by delegates or speakers at the Conference.

### **MOBILE TELEPHONES**

**Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.**



**THE PHILANTHROPY PARTNER**

**YOU CAN TRUST**

You work to secure the financial well-being of those you advise. We partner with donors to realise greater impact through their giving. Together, we can provide seamless service to fulfil your clients' charitable ambitions.

**Discover more by visiting our stand or get in touch with our team.**

#### CONTACT US



[cafonline.org/professional-advisers](https://cafonline.org/professional-advisers)



[philanthropy@cafonline.org](mailto:philanthropy@cafonline.org)



03000 123 950

**CAF**  
Charities Aid Foundation

Registered charity number 268369

Image credit: DisabilityIN

Wealth Management for  
Americans from London

Your wealth. Your way.



We serve Americans based in the US and UK, however complex their needs.

Contact [martin.heale@schroders.com](mailto:martin.heale@schroders.com) on +44 20 7658 3602  
or [janette.saxer@schroders.com](mailto:janette.saxer@schroders.com) on +44 20 7658 1245

[wealth.schroders.us](http://wealth.schroders.us)

**Schroders**  
Wealth Management

**Your capital is at risk when investing.**

Issued by Schroder Wealth Management (US) Limited. Registered office at 1 London Wall Place, London EC2Y 5AU. Registered number 10761882 England. Authorised and regulated by the Financial Conduct Authority and registered as an investment adviser with the US Securities and Exchange Commission. For your security, communications may be recorded and monitored. G24003\_CA2015729\_0125

**Bellecapital**



REFRESHINGLY  
TRANSPARENT INVESTMENT ADVICE



# Belluzzo

INTERNATIONAL PARTNERS



**VERONA** Vicolo Pietrone, 1/B | **MILAN** Via Andegari, 4 | **LONDON** 38, Craven Street

**SINGAPORE** 101 Cecil Street #14-12 | **LUGANO** Via Serafino Balestra, 10

**ROME** Viale Regina Margherita, 294 | **ABU DHABI** Level 12, Al Sila Tower, ADGM Square, Al Maryah Island



**Burges Salmon is the leading choice for complex and specialist advice in private wealth, with one of the largest dedicated teams in the UK.**

We are recognised nationally and internationally for advising individuals, families and their global wealth.



We look forward to seeing you at the conference



**Suzanna Harvey**  
Head of Private Wealth

E: [suzanna.harvey@burges-salmon.com](mailto:suzanna.harvey@burges-salmon.com)  
M: +44 (0) 7968 195 145



**Justin Briggs**  
Partner

E: [justin.briggs@burges-salmon.com](mailto:justin.briggs@burges-salmon.com)  
M: +44 (0) 7968 193 281



**Emma Heelis-Adams**  
Partner

E: [emma.heelis-adams@burges-salmon.com](mailto:emma.heelis-adams@burges-salmon.com)  
M: +44 (0) 7814 166 091

Charles  
Russell  
Speechlys

# *Understanding people is our business.*

---

We are an *international* law firm with a focus on private capital, at the intersection of personal, family and business.

[charlesrussellspeechlys.com](https://charlesrussellspeechlys.com)

London | Guildford | Cheltenham | Paris | Luxembourg | Geneva | Zurich | Milan | Dubai | Manama | Doha | Hong Kong | Singapore

# CRESTBRIDGE FIDUCIARY

A US JOINT VENTURE WITH  Willow Street

Crestbridge Fiduciary offers clients a forward-thinking approach to protecting and structuring wealth. Bringing together leading trust and fiduciary service providers Crestbridge Family Office Services and Willow Street, Crestbridge Fiduciary is independent and focuses exclusively on trustee services.

Client families benefit from seamless relationship management across three jurisdictions: Wyoming, Jersey, and the Cayman Islands.

Our offerings include corporate trustee services and private trust company advisory, governance, and administration.



**WINNER**  
*Independent Trust Firm - Latin America*

**Crestbridge Fiduciary**



**Darrell King**  
Managing Director,  
Americas  
darrell.king@crestfos.com



**Heather Tibbo**  
Member, Board  
of Managers  
heather.tibbo@crestfos.com



**Steve Sokić**  
Chairman, Crestbridge  
Family Office Services  
steve.sokic@crestfos.com



**Mark Beer**  
Client Director  
mark.beer@crestfos.com



# Why Guernsey for private wealth?

---

## **Robust regulatory environment**

With an independent legal system and a breadth and depth of service providers

## **Committed to international standards**

Respecting clients' right to privacy

## **A safe, secure and politically stable environment**

---

A background image of a mountain range with snow-capped peaks and a person standing on a rocky peak with arms raised in a gesture of triumph or achievement. The scene is bathed in a soft, blue light, suggesting dawn or dusk. A solid green square is positioned on the left side of the page, partially overlapping the text.

# OUR PASSION: EXCELLENT PRIVATE CLIENTS ADVICE

**We stand for highest quality in legal and tax advice.** With our professionals in Germany as well as reliable partners around the world, we offer comprehensive international legal and tax advice for individuals, families, businesses, foundations etc.

Our aim is to find individual solutions to the complex legal and tax challenges that our clients face in a national and international context. Whether it is a corporate or wealth succession, the establishment or administration of foundations and non-profit organisations, a family governance or asset protection issue – our interdisciplinary advisors find the right solution with highest professional competence, pragmatism, plain speaking and trust in our values. That's why our clients choose us for long-standing relationships and as trusted advisors.

**With more than 400 lawyers, tax advisors and notaries providing legal and tax services across eight offices in Germany, HEUKING is one of the major commercial law firms in Germany.**

---

Berlin  
Chemnitz  
Cologne  
Dusseldorf

Frankfurt  
Hamburg  
Munich  
Stuttgart

[heuking.com](https://www.heuking.com)

## PRIVATE CLIENTS

### OUR PRACTICE

The Firm has developed a unique contentious and non-contentious expertise in the private client and wealth management area, focusing on national and international tax and non-tax issues.

The presence of the Firm also in London, with its brand-new office located in the vibrant Mayfair area, ensures a key hub for all international private clients.

### AREAS OF EXPERTISE



DOMESTIC AND CROSS-BORDER  
SUCCESSIONS



TAX LITIGATIONS, SETTLEMENTS  
AND REGULARIZATION PROCEDURES



TRUSTS, FOUNDATIONS  
AND CHARITIES



FAMILY LAW INCLUDING NUPTIAL  
AGREEMENTS AND DIVORCE



RELOCATION OF INDIVIDUALS  
AND PRE-IMMIGRATION PLANNING



REAL ESTATE



TAXATION OF REMUNERATION PACKAGES  
AND CARRIED INTEREST PAYMENTS



FAMILY GOVERNANCE  
AND FAMILY OFFICES



ART AND LUXURY GOODS



TRUST, INHERITANCE  
AND DIVORCE LITIGATION

### KEY CONTACTS



**Guglielmo  
Maisto**  
Senior Partner

[g.maisto@maisto.it](mailto:g.maisto@maisto.it)



**Marco  
Cerrato**  
Partner

[m.cerrato@maisto.it](mailto:m.cerrato@maisto.it)



**Alessandro  
Bavila**  
Partner

[a.bavila@maisto.it](mailto:a.bavila@maisto.it)



**Alberto  
Brazzalotto**  
Partner

[a.brazzalotto@maisto.it](mailto:a.brazzalotto@maisto.it)

[www.maisto.it](http://www.maisto.it)

[info@maisto.it](mailto:info@maisto.it)

[Maisto e Associati](https://www.linkedin.com/company/maisto-e-associati)

*“They are the cutting edge  
of Italian tax legislation.”*

(Chambers HNWI)

”



# Your business, our dedication.

A dynamic presence in the market – Walder Wyss is one of the biggest Swiss commercial law firms. We especially specialize in corporate and commercial law, banking and finance, intellectual property and competition law, dispute resolution, estate and family as well as tax law. With more than 300 legal experts and six locations, we provide our clients with a seamless one-stop shop, personalised and high quality services in all language regions of Switzerland.

## Main contacts



**Robert Desax**

lic. iur., LL.M., Attorney at Law,  
Certified Tax Expert

Partner

Phone +41 58 658 52 77

robert.desax@walderwyss.com



**Fouad G. Sayegh**

lic. iur., LL.M., Attorney at Law

Partner

Phone +41 58 658 30 35

fouad.sayegh@walderwyss.com



**Olivier Sigg**

lic. iur., Attorney at Law, TEP

Partner

Phone +41 58 658 30 20

olivier.sigg@walderwyss.com



**Kinga M. Weiss**

Dr. iur., LL.M., TEP, Attorney at Law,  
Certified Specialist SBA Inheritance Law

Partner

Phone +41 58 658 56 80

kinga.weiss@walderwyss.com

withersworldwide  
The law firm for success

# What does success mean to you?

---

We are the leading global law firm for successful individuals, their private capital and businesses in the digital and physical worlds.

For over 125 years, we have been proud to partner with our clients to realize their ambitions, protect their family and interests, and help them use their resources to shape the future.



**Whatever success means,  
we can help.**

[withersworldwide.com](https://withersworldwide.com)



Attorney advertising



# Unique island. Unique tax system.

With an attractive tax system, it's easy to see how your business will flourish. But with a thriving community and exceptional quality of life, it's more than just a smart move.

To start your journey, call the Locate Guernsey team on +44 (0)1481 220011, email [enquiries@locateguernsey.com](mailto:enquiries@locateguernsey.com), or visit [locateguernsey.com](http://locateguernsey.com)



Greenberg Glusker proudly supports the

# International Bar Association 30th Annual International Private Client Tax Conference

## **Tax and Trusts and Estates Lawyers for Successful Individuals, Businesses, and Families.**

Our Private Client Services Group serves some of the most discerning ultra-high-net-worth individuals and families in California and beyond, as well as family offices, corporate and individual professional fiduciaries, and public and private non-profit organizations. Attorneys in our Taxation Group provide comprehensive and strategic tax planning counsel and representation in local, state, federal, and international tax issues.



**Laura A. Zwicker**  
lzwicker@ggfirm.com



**Thomas M. Giordano-Lascari**  
tgiordano@ggfirm.com

Visit [www.greenbergglusker.com](http://www.greenbergglusker.com) for more information.

## Private Asset Owners



We bring unparalleled ‘know how’ and tailor our services around your strategy and desired outcomes, deploying at a global scale by dedicated client teams with a unique depth of experience using our powerful, sector-leading technology. We are committed to ‘know you’, leveraging intelligence and experience to deliver the highest standards of wealth governance and oversight.

### Our expertise:

- Asset protection
- Succession planning
- Family office support
- Philanthropy
- Alternative assets
- Commercial assets
- Private funds
- Trustee services

To find out more about our services, contact:



### Chip Martin

President, Private Wealth, U.S.

[E chip.martin@iqeq.com](mailto:chip.martin@iqeq.com)



### David Giannone

Chief Commercial Officer, Americas

[E david.giannone@iqeq.com](mailto:david.giannone@iqeq.com)

\*Correct as of Feb 2025

This document is provided for information purposes only and does not constitute legal, tax, investment, regulatory, accounting or other professional advice. For more information on the legal and regulatory status of IQ-EQ companies please visit [www.iqeq.com/legal-and-compliance](http://www.iqeq.com/legal-and-compliance)

Reference: 7845\_03022025

© IQ-EQ 2025

# \$750<sup>+</sup>bn

Assets under administration

# 25

Worldwide locations

# 100<sup>+</sup>

Family office clients

# 20 yrs

Minimum senior years' experience

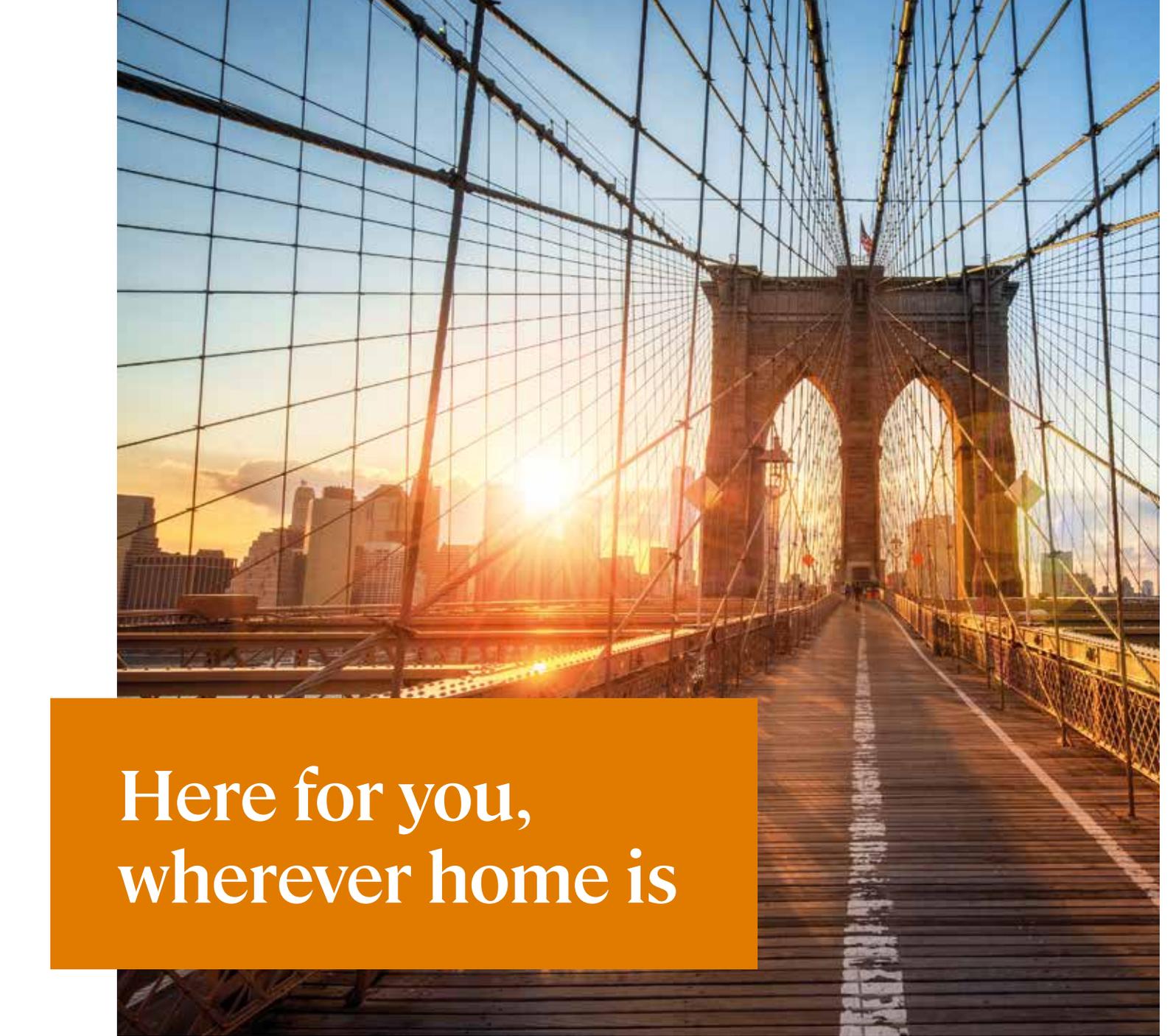
[www.iqeq.com](http://www.iqeq.com)



**kore** UNIQUE  
MODERN  
GLOBAL

Bridging Gaps, Creating Solutions





# Here for you, wherever home is

Wealth management is about building lasting partnerships and we strive to exceed our clients' expectations, whether they reside in the US, UK or overseas. [www.lgtwm-us.com](http://www.lgtwm-us.com)

Forward-looking  
for generations



Wealth  
Management US