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INTERNATIONAL BAR ASSOCIATION CONFERENCE 2026

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

31st Annual International Private Client Tax Conference: private wealth seeking shelter and opportunity alike

1–3 March 2026, Raffles OWO, London, England

Working programme

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Headline
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sponsor

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All speaker materials and biographies can be found at www.ibanet.org/conference-details/conf2686

Conference Co-Chairs

Gerd D Goyvaerts *Tiberghien, Antwerp; Member, IBA Private Client Tax Committee Advisory Board*
Inbal Faibish Wassmer *Goldfarb Gross Seligman, Zürich; Co-Chair, IBA Private Client Tax Committee*
Percy Castle *Casahierro Abogados, Lima; Co-Chair, IBA Private Client Tax Committee*
Carine Tohme *Tohme Law, Beirut; Senior Vice Chair, IBA Private Client Tax Committee*

Sunday 1 March

1800 – 1930 **Hosted welcome reception**

*Phillips Auction House
30 Berkeley Square, Mayfair, London W1J 6EX*

Conference reception kindly provided by Phillips Auction House.

This reception, which will welcome all delegates to the Conference, will also be an opportunity to view some of their current works. All registered delegates are welcome to attend.

Monday 2 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 four-pillar dialogue: family office, legal, banking and investment advisory.
Perspectives on global private client challenges**

This panel brings together representatives of the four key pillars that shape the decision-making ecosystem of international private clients: family offices, legal advisers, private bankers and investment professionals. Through a dynamic, practice-oriented discussion, the speakers will explore how these disciplines interact when addressing complex cross-border issues for wealthy families, including governance structures, succession planning and wealth deployment strategies.

Session Co-Chairs

Alessia Allegretti *Boies Schiller Flexner, Milan; European and North American Regional Fora Liaison Officer*

Megan Worrell *JP Morgan, New York; Committee Liaison Officer, IBA Private Client Tax Committee*

Speakers

Jochen Vogler *BelleCapital, Zürich*

Jeannette Yazedjian *Private Family Office, Los Angeles, California; Young Lawyers' Committee Liaison Officer, IBA Private Client Tax Committee*

MOBILE TELEPHONES

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Headline social event sponsors



Monday continued

1015 – 1100 **Keynote address**
From 'tax-efficient' to 'future-proof': why today's best wealth planning is as much about governance, integrity and resilience as it is about structuring

Speaker

Patricia M Angus *Founder and CEO, Angus Advisory Group, New York; Adjunct Professor and Founder, Global Family Enterprise Program, Graduate School of Business, Columbia University*

1100 – 1130 **Coffee/tea break**

1130 – 1245 **Navigating civil law constructs in common law jurisdictions. Why make it easy when complexity is an option?**

In this panel, we will explore the challenges and potential pitfalls which arise when implementing civil law structures – such as Usufruct, Bewind and Fideicomiso – in common law jurisdictions. Panellists will unpack tax treatment, legal characterisation and ownership issues (during lifetime and after death), pinpointing where multi-jurisdictional mismatches may arise and how to anticipate and manage them. Through case studies, we will also cover reporting and transparency, as well as practical considerations for private client advisers trying to find pragmatic and predictable solutions which work across borders.

Session Co-Chairs

Iskra Doukova *Macfarlanes, London*

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

Speakers

Michaël Khayat *Arkwood, Paris*

Shawntel Randi *Nixon Peabody, New York; Scholarship Officer, IBA Private Client Tax Committee*

Nicola Saccardo *Charles Russell Speechlys, London/Milan*

Rahul Sharma *Fasken, Toronto, Ontario*

1245 – 1400 **Lunch**

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Associate conference sponsors



Monday continued

1400 – 1515

Round table session

Artificial Intelligence in the private clients practice: AI as a friend or foe, a round table discussion

Artificial intelligence is increasingly shaping the private clients practice, transforming how advisors work, make decisions, and interact with their clients. While AI offers significant opportunities for greater efficiency, deeper insights, and innovative services, it also raises important legal, ethical, and practical questions. In this round-table discussion, we will explore whether AI should be viewed as a trusted ally or a potential challenge in the private clients practice, and how professionals can navigate the opportunities and risks ahead (generated by ChatGPT).

Session Co-Chair

Jochen Kotzenberg *Flick Gocke Schaumburg, Bonn; Publication and Newsletter Editor, IBA Private Client Tax Committee*

Moderators

Eduardo Arista *Holland & Knight, Miami, Florida*

Jack Bernstein *Aird & Berlis, Toronto, Ontario*

Ruth Bloch-Riemer *Baer & Karrer, Zürich*

Andreu Bové Boyd *Bové Montero y Asociados SL, Madrid*

Ryan Coyle *Bilzin Sumberg, Miami, Florida; Member, LGBTQI+ Law Committee Advisory Board*

Rebecca Diacono *Fenech and Fenech Advocates, Valletta*

Kira Egorova *ALRUD Law Firm, Moscow; Session Reports Liaison Officer, IBA Private Client Tax Committee*

Elina Filippou *Zepos & Yannopoulos, Halandri*

Joakim Frande *Hannes Snellman, Helsinki*

Paula Jones *Jones Estate Group Inc, New York*

Jane Ren *Fangda Partners, Shanghai*

Daniel Simon *Collyer Bristow, London*

Reshma Shah *Duane Morris, New York, New York*

John Shoemaker *Butler Snow, Singapore*

Pleuni Visser *Loyens & Loeff, Amsterdam*

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

1515 – 1545

Coffee/tea break

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Conference reception and dinner sponsors



Wealth
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Conference luncheon sponsor



Monday continued

1545 – 1700

International estate planning for Latin American families: Miami, Madrid or both?

In this panel, we will discuss the private law institutions that allow for an effective cross-border protection of family wealth as well as its efficient transfer to the next generation. Among others, we will discuss how lasting powers of attorney, prenuptial agreements, matrimonial property agreements, lifetime transfers, wills and will-substitutes travel across jurisdictions and how to coordinate them properly. Emphasis will be added to the different forms of estate administration. The panel will approach the matter following the case method using as key factors residency of the different individuals and place of location of the assets.

Session Co-Chairs

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

Arianne R Plasencia *McDermott Will & Schulte, Miami, Florida*

Speakers

Victor Manuel Barajas Barrera *Basham Ringe y Correa, Mexico City*

Rodrigo Castillo Cottin *Rimon, Bogotá*

Adriane Pacheco *Humberto Sanches e Associados, São Paulo*

1900

Conference reception and dinner

The National Gallery

Trafalgar Square London, WC2N 5DN

Ticket price: £185

One place per registered delegate is permitted.

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

Tuesday 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

0800 – 0900

Hot topics in your jurisdiction: a roundtable

Kickstart your morning with a cup of coffee and a rousing discussion of... You! Is there new legislation affecting your practice? Any relevant new cases? Have recent legal or regulatory changes keeping you up at night or let you sleep better? How are you sourcing and retaining talent for your firm? Please come share with us the hot topics in your jurisdiction and in your practice. 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.

Session Co-Chairs

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

Anne Guichard *N3T Notaires, Paris; Member, Private Client Tax Committee Advisory Board*

Moderators

Dimitria Coucouni-Andreou *Andreas Coucounis & Co, Larnaca*

Nicole Najjar *Mattos Filho, São Paulo*

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

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0915 – 1030

The \$100,000 jurisdictional challenge: A fast-paced and exciting discussion comparing old and new planning jurisdictions

A lively side-by-side comparison of several popular jurisdictions for setting up planning and governance structures, focusing on the differences between the traditional jurisdictions and the 'new' planning jurisdictions. The panel will discuss the various entity and structure options in each jurisdiction, the strength of the relevant court system, any reputational issues, the depth and quality of the relevant legal and service providers, whether the country is or has been on any 'grey' lists as well as any relevant tax and cost factors.

Session Co-Chairs

Grete Ciniglio *Fabrega Molino, Panama City; Treasurer, IBA Private Client Tax Committee*

Eric Dorsch *Kozusko Harris Duncan, New York; Vice Chair, IBA Private Client Tax Committee*

Speakers

Ramona Cassar *WH Partners, Valetta*

David Chee *Wong Partners, Singapore*

Natasha Kapp *Carey Olsen, St Peter Port, Guernsey*

Anna Turska-Tomczykowska *Tomczykowski Tomczykowska, Warsaw*

Ajay Wiltshire *IMR, Dubai*

1030 – 1100

Coffee/tea break

1100 – 1215

Drifting away and losing focus: the aging HNW client in his wisdom, confusion and vulnerability

This session explores what happens when aging clients change wills, remarry, gift generously, or disinherit heirs – all seemingly within their rights. We will examine where autonomy ends and undue influence begins, and what lawyers, banks, and custodians should do when the lines blur. From 'heir hunting' to sudden consultant changes, we address the legal and ethical tensions that arise when perception diverges from reality. It's a discussion about law, dignity, and professional responsibility – and about protecting clients, even when they resist it.

Session Co-Chairs

Rachel Mainwaring-Taylor *RMT Law Limited, Harrogate*

Markus Zwicky *Zwicky & Partner, Zug; Diversity and Inclusion Officer, IBA Private Client Tax Committee*

Speakers

Tom Amlot *Penningtons Manches Cooper, London; Global Guides Officer, IBA Family Law Committee*

Jake Kaplan *Alston & Bird, Atlanta, Georgia*

Helene Rebholz *paragraph7, Vaduz*

Dr Kapila Sachdev MB BS MRCPsych *Consultant Old Age Psychiatrist, Halcyon Doctors, Hitchin, Hertfordshire; Special Visitor for the Office of Public Guardian*

1215 – 1345

Lunch

1345 – 1500

Home is where the heart is ... or the taxman says! Global mobility and the digital nomad

As tempting as it could sound to pack your bags and leave the rat race behind, unfortunately there is no such thing as being a 'citizen of the world' when it comes to the tax authorities! In this session, our speakers will discuss how countries are succeeding or failing in attracting the new generation of internationally mobile wealth creators. As well as illustrating some of the opportunities available, the panel will share some cautionary tales of when clients have ended up feeling 'stuck' rather than 'mobile'!

Session Co-Chairs

Michael Rutili *Stephenson Harwood, London; Conference Quality Officer, IBA Private Client Tax Committee*

Emilie Van Goidsenhoven *Tiberghien, Brussels*

Speakers

Robert Desax *Walder Wyss, Zurich*

Kärt Anna Maire Kelder *Sorainen, Tallinn*

Xavier Xivillé *Cuatrecasas, Barcelona*

1500 – 1530

Coffee/tea break

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1530 – 1645

Murphy's law in estate planning: things will and have gone wrong

In cross-border estate planning, even the most carefully designed structures can unravel when laws, families, and jurisdictions collide. This session examines how 'anything that can go wrong, will go wrong' plays out in real private-client practice and how advisers can anticipate, prevent, and manage the fallout. Drawing on real-world case studies, our panel will explore common and unexpected points of failure: mismatched succession regimes, defective trust and foundation governance, tax-residency surprises, forced-heirship conflicts, overlooked digital assets, and the human element—family dynamics, incapacity, and fiduciary missteps. We will discuss practical strategies to build resilience into international plans, respond to emerging risks, and navigate crises when they inevitably arise. Participants will leave with a sharper understanding of how to stress-test estate plans, communicate risk, and craft solutions that withstand the messy realities of global families.

Session Co-Chairs

Jérôme Assouline *Sekri Valentin Zerrouk, Paris*

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

Speakers

Nicholas Holland *Maples Group, Grand Cayman, Cayman Islands*

Barbara Schuck *Quilvest Services Ltd, Zürich*

Sunita Singh-Dalal *Hourani, Dubai*

Mirjam Vögeli *Blum & Grob, Zürich*

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.

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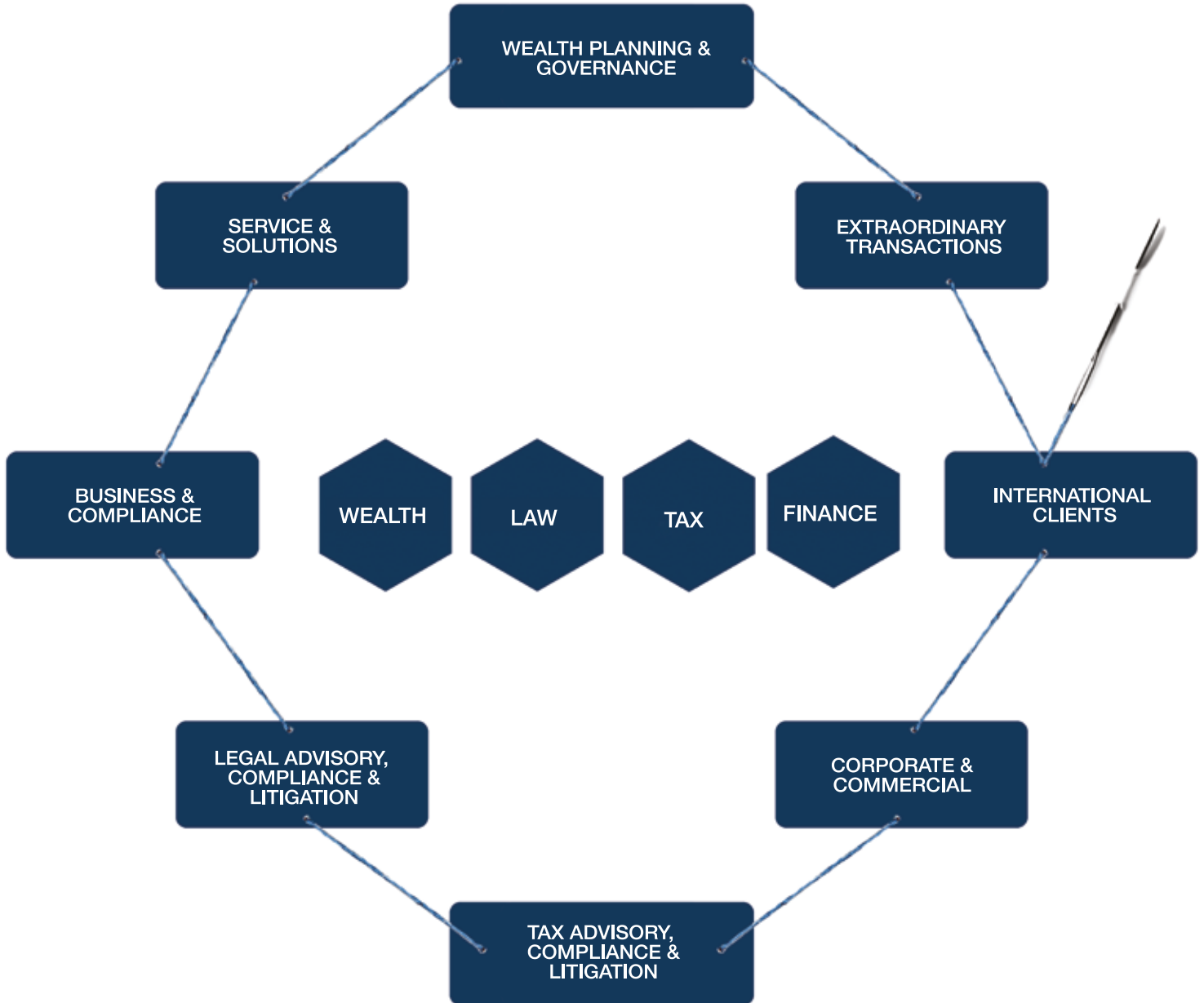
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We look forward to seeing you at the conference



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A background image of a mountain landscape at dawn or dusk. The sky is a mix of blue and purple, and the mountains are covered in snow. In the foreground, a person stands on a rocky peak with their arms raised in a gesture of triumph or joy. The overall mood is serene and aspirational.

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Fitch Ratings has affirmed Utmost's core insurance subsidiaries at 'A+' as at October 2025.

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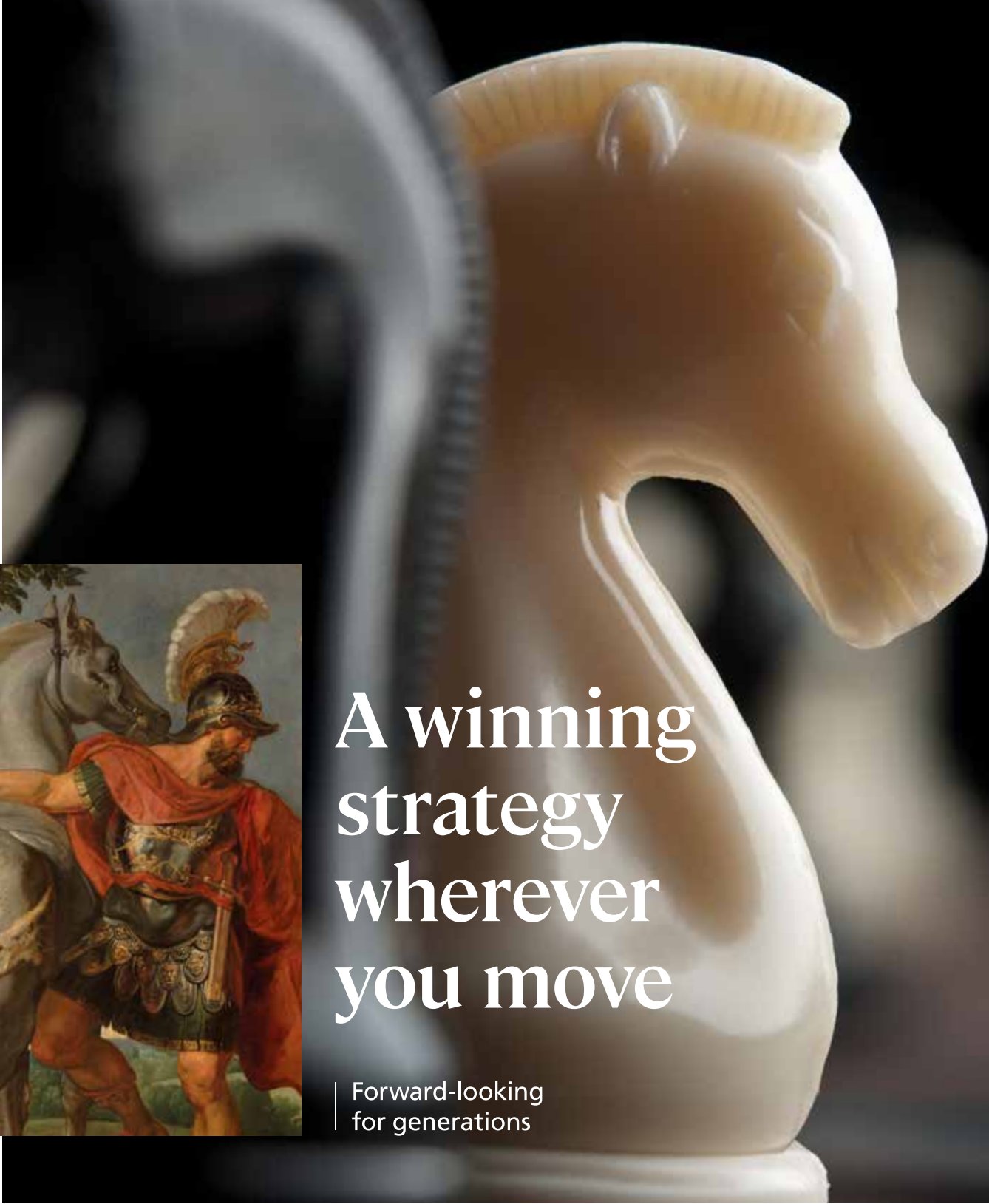
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