

Change of Trustee: A Multi-Jurisdictional Perspective

SPEAKERS

- Andrea Vicari, founder and managing partner of [Vicari Avvocati](#)
- Guillaume Grisel, Partner [Schellenberg Wittmer Ltd](#)
- René Felder, [Seratio](#)
- Keith Dixon, Partner, [Carey Olsen](#)
- Clementine Dowley, Partner [Payne Hicks Beach](#)

Programme:

14.00 | Registration

14.20 | Welcome | Filippo Turato

14:30 | Italy | Andrea Vicari

The liability of the outgoing trustee and the new trustee towards third parties. The interplay between the Hague Convention 1985 and the rules of private international law: which law governs the matter?

15:00 | Switzerland | Guillaume Grisel

Trustee succession in a regulated environment. The impact of Swiss professional trustee regulation on the selection, appointment and replacement of trustees, with particular regard to licensing requirements, professional standards and supervisory oversight. The role of FINMA in cases of critical concern. Recent developments in Swiss practice and case law.

15:30 | Liechtenstein | René Felder

The technical specificities of Liechtenstein trust law in the context of a change of trustee: the right to information and the scope of trustee liability upon transfer of office, also in the light of the last reform.

16:00-16:10 | Individual Break

16:10 | Jersey | Keith Dixon

Date

THURSDAY, 25 JUNE 2026
14:20 - 18:30

Venue

WEBINAR Lugano
ZOOM

Link and presentation will be sent in advance
SCHWEIZ

Registration by

WEDNESDAY, 24 JUNE 2026

CPD

3 hours towards CPD obligation

Fee

present Members 80.00 CHF
present Non-Members 100.00 CHF
present STEP Students/Committee Members 50.00 CHF
present Sponsors free of charge
on-line Members 40.00 CHF
on-line Non-Members 60.00 CHF
on-line STEP Students/Committee Members 30.00 CHF
on-line Sponsor free of charge

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Programme

14.00 | Registration
14.20 | Welcome
14.30 | Presentations Part I
16:00 | Individual Break
16.10 | Presentations Part II
17.30 | Closing – End of evening

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The outgoing trustee's rights of indemnity and recourse as against those of the incumbent trustee: pari passu or priority in time? A discussion in light of Equity Trust (Jersey) Ltd v Halabi [2022] UKPC 36.

16:40 | England and Wales | Clementine Dowley

The appointment of a successor trustee as the exercise of a fiduciary power: the criteria by reference to which a particular individual or institution ought to be selected, and the standards that should govern that choice. The remedies available where an unsuitable trustee has been appointed; whether the retiring trustee may intervene in such circumstances; and the rights and remedies available to beneficiaries and protectors respectively.

17:30 | Closing – End of evening

Looking forward to meet you there
Committee STEP Lugano

WEBINAR LUGANO

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