



Wealth Management Planning Seminar

Seabreeze Ballroom, SuperClub Breezes
Tuesday, March 20 2007



(A technical review with practical guidance to recent product legislation for estate planning, considering the needs of domestic and international clients)

08:00 **Registration**

08:45 **Welcome & Introduction**

*Paul J. Winder, Chairman, Society of Trust & Estate Practitioners (STEP Bahamas)
Wendy Warren, CEO & Executive Director, Bahamas Financial Services Board (BFSB)*

09:00 **Private Trust Companies**

*Andrew Law, President & CEO, International Protector Group
Michelle Neville-Clarke, Partner, Lennox Paton
Nadia Taylor, Associate, Higgs & Johnson*

10:00 **Coffee Break**

10:15 **SMART© Funds**

David Thain, Managing Director, Arner Bank & Trust

11:15 **Foundations**

*Bryan Glinton, Partner, Glinton Sweeting O'Brien
Heather Thompson, Partner, Higgs & Johnson*

12:30 **Using The Bahamas for the Management of Private Wealth**

Steve Cantor, Partner, Cantor & Webb, P.A.

13:00 **Lunch**

14:30 **Domestic Asset & Investment Management**

*Ken Kerr, Chief Executive Officer, Providence Advisors
Anthony Ferguson, Principal, CFAL (invited)*

15:30 **Coffee Break**

16:00 **Domestic Wealth Planning**

***Financial Planning** – Dianne Bingham, Manager-Private Banking, Scotiabank
Trusts for Bahamians – Ursula Rolle, Asst. Vice President, Fidelity Merchant Bank & Trust
Bahamian Wills - Tanya Hanna, Partner, Graham Thompson & Co.*

17:00 **Wrap Up & Conclusion**

*Co-sponsored by the Bahamas Financial Services Board (BFSB) and
the Society of Trust and Estate Practitioners (STEP) Bahamas Branch*

