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STEP Zurich

The use of U.S. Trusts for Asset Protection, Privacy and Tax Planning

US Tax and Trust Webinars held over two parts / Part ONE

WEBINAR / Zurich Centre

SPEAKER
David A. Warren, JD | Co-Founder and Chairman of the Board at Bridgeford Trust Company
www.bridgefordtrust.com

DATE
Monday, 6th December 2021

TIME

TIME	12.00 – 13.30 hrs.
Registration	12.00 – 12.05 hrs.
Talk and Questions	12.05 – 13.30 hrs.

WEBINAR
Link and presentation will be sent in advance.

REGISTRATION
By 3rd December 2021
to events@step-ch-fl.com

CPD
1 ½ hours towards CPD obligation

WEBINAR - FEE	CHF
Members	40.00
Non-Members	50.00
STEP Students	30.00

CONDITIONS
Reserved places will be charged, unless cancelled 24 hours before the event.

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Yours sincerely,
STEP Office Zug

Corinne Graf
Administration/Events

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The Verein STEP is a part of Swiss and Liechtenstein STEP Federation and STEP Worldwide

WEBINAR / Zurich Centre
On-line / Monday, 6th December 2021 / 12.00 hrs.

TOPIC

The use of U.S. Trusts for Asset Protection, Privacy and Tax Planning
The talk will cover the following items:

- U.S. trust law planning tools – including directed trusts and the trust protector concept.
- Examination and comparison of commonly used U.S. trust jurisdictions.
- Recent data leaks and the impact on the U.S. trust planning industry.

SPEAKER

Co-Founder, Chairman of the Board at Bridgeford Trust Company

David Warren is Co-Founder and Chairman of the Board as well as a member of the Trust Administrative Committee of Bridgeford Trust Company. He is also President and CEO of Bridgeford Advisors, a sister company of Bridgeford Trust Company. David is an attorney with over 20 years of professional experience practicing law and working in the financial services industry serving the trust and wealth management needs of high and ultra-high net worth families across the nation and around the world.

Prior to establishing Bridgeford Trust Company, David was recruited out of a prestigious Mid-Atlantic law firm, to join the Wealth Management/Trust Department of a large regional bank as a Vice President/Senior Trust Administrator. In this position, he worked extensively with wealthy families and individuals on a variety of trust and fiduciary issues. David subsequently transitioned his career to Bank of New York Mellon and later to PNC Wealth Management where he worked exclusively and extensively with ultra-high net worth families on various wealth management issues including tax planning, asset protection, and legacy planning.

David is very active in the community having served in leadership roles for many non-profit organizations over the years. He is also active in several groups and organizations, including the Society of Trust and Estate Practitioners (STEP) and the Key Biscayne Bar Association, as both a speaker and supporter of their events. David is also a past member of Vistage International – the world's foremost executive leadership organization.

David speaks throughout the country and around the world on modern and progressive U.S. trust law, addressing several professional organizations and various audiences each year. He is also a past lecturer for the Pennsylvania Bar Institute (the continuing education arm of the Pennsylvania Bar Association) and is a former adjunct professor at Harrisburg Area Community College where he taught courses in the business law and paralegal programs, such as Trusts and Estates and Business Law. In addition, he is frequently published and quoted by publications on various trust and estate planning topics.

David earned a Bachelor of Applied Science, Political Science and Government from Albright College and a Juris Doctor degree from Suffolk University Law School.

November 2021/cg

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