



## DATE & TIME

TUESDAY  
15<sup>TH</sup> SEPTEMBRE 2026  
08:30 - 17:30

## VENUE

Warwick Hotel  
14 rue de Lausanne  
1201 Genève  
tél.: 022 716 82 93

Possibility to participate for a full day or half day.

# REGULATORY AND PROFESSIONAL TRAINING FOR TRUSTEES

## REGULATORY CONTENT (AMLA / FINIA / Other Regulations)

**08:30** Registration and opening address by ARIF/STEP  
*Welcome coffee served before 08:30 and coffee break during the morning*

**Philipp FISCHER, Attorney at law,  
Partner, Lenz & Staehelin**  
"Outsourcing and cyber risks"

**Alexander GRETER, Attorney at law,  
Partner, Lenz & Staehelin**  
"New transparency register and revision of the AMLA (new rules for advisors)"

**Michael RUCHENSTEIN, Director, ASMA Asset Management Audit & Compliance SA**  
«Prudential audit for trustees and lessons learnt from the first audits»

Questions and answers

**12:30** Lunch break  
*(included for full day participants)*

## TRUSTEE PROFESSIONAL CONTENT

**13:30** Opening address by ARIF/STEP  
*Coffee break during the afternoon*

**Stéphanie JARRETT,**  
Offices of Stephanie A. Jarrett, Vaud and Chair, STEP Geneva  
Second speaker to be confirmed  
"Trust update"

**Andrew McCALLUM, Senior Partner, R&H Switzerland and Chair, STEP Switzerland**  
Second speaker to be confirmed  
"Transfer of ownership"

**Stéphanie HODARA EL BEZ, Attorney at law,  
Partner, Altenburger Ltd legal + tax**  
"Conflict of interest : legal cases"

**17:30** End of the course

## Prices (including 8.1% VAT)

**ARIF / OSIF / STEP members and auditors :**  
Half day CHF 490.-  
full day, lunch included CHF 690.

**Others**  
Half day CHF 690.-  
full day, lunch included CHF 890.

### Recognition

This training course, organised in half-day or full-day sessions, aims to provide financial intermediaries subject to the AMLA and the legal provisions of FinIA, trustees, as well as auditors, with continuous training on regulatory and professional aspects. A certificate of participation will be provided.



CWMA-23-ARIF-3008  
CWMA-23-ARIF-3009