

Embracing MiFID II: The must-knows

STEP EVENING EVENT - LUCERNE/ZUG CENTRE

SPEAKERS

Roderik J.P. Strobl www.nsfpartner.li
Alexander Fitzner www.nsfpartner.li

DATE

Tuesday, 29th May 2018

TIME

	17.45 – 19.45 hrs.
Registration	17.30 – 17.45 hrs.
Talk and Questions	17.45 – 18.45 hrs.
Apéro	18.45 – 19.45 hrs.

VENUE

City Garden Hotel Zug
Metallstrasse 20, 6300 Zug, 041 727 44 44
www.cu-restaurant.ch/kontakt/

SPONSORED BY



STEP Office Zug

Corinne Graf
Administration/Events

REGISTRATION

by 28th May 2018
to events@step-ch-fl.com

CPD

1 ½ hours towards CPD obligation

FEE

	CHF
Members	40.00
Non-Members	60.00
STEP Students	30.00

CONDITIONS

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

SPONSORING our events, always WORTHWHILE! Our STEP Office will be pleased to assist you, 041 727 05 27.

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Verein STEP, c/o STEP Office, Neugasse 12, 6300 Zug

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

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City Garden Hotel Zug / 29th May 2018 / 17.30 hrs.

TOPIC

Embracing MiFID II: The must-knows

Roderik J. P. Strobl and Alexander Fitzner will bring you closer to the EU's ambitious regulatory reform in respect to its key aims, which actors it will affect in the financial industry, the markets it covers and its main powers.

You will learn about why MiFID II has been implemented, key dates and milestones, and how Switzerland will be affected by it. It can be expected that after the presentation you will have basic knowledge of MiFID II must-know aspects that you will be able to apply and explore further in your daily working assignments.

First email interactive featured STEP presentation in Switzerland

In addition to the usual presentation, you have for the first time the possibility to send in 2 questions via email, which will be taken into account by the speakers.

- Please send your two key questions to events@step-ch-fl.com prior to May 22, 2018.
- Questions received after this date will not be considered in the presentation.

SPEAKERS

Alexander Fitzner LL.M., TEP, Attorney-at-Law

Alexander Fitzner is Associate at NSF Services Trust reg., Vaduz and Sele Frommelt & Partners Attorneys at Law. He advises private and institutional clients in corporate laws, as the formation, management and structuring of companies, foundations and trusts, as well as in matters of succession and estate planning, asset preservation and selected tax aspects. Further, he advises Family Offices in regulatory matters and gives legal advice in business, banking and finance laws, including in matters of FinTech and Blockchain.

Before joining NSF and Sele Frommelt Alexander was Legal Counsel and Compliance Officer at an international Trust and Corporate Service Provider in Zurich and heading the Zurich office of a boutique law firm with representative office in Hong Kong, Berlin and London.

Alexander holding a law degree and a Master of Laws degree in international business and tax and is admitted to the bar in Germany and Switzerland (Canton of Zurich). Further Alexander is fully qualified STEP Member and member of the board of a charitable foundation.

Roderik J. P. Strobl BA, MBA, EMBA, TEP

Roderik J. P. Strobl is a senior adviser at NSF & Partner Schweiz AG, NSF Services Trust reg., Vaduz and Sele Frommelt & Partners Attorneys at Law. He advises on important international private and institutional mandates in the respective field of wealth planning, management, succession, development, structuring and other topic related services. His expert knowledge and practical

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experience ranges from the analysis, proposal development and implementation stages of standard compliant wealth-planning instruments to multi-layered client relationship management services and models in key OECD white-listed jurisdictions.

Prior to his current assignment at NSF, Roderik was a senior adviser at Crédit Agricole Indosuez (Switzerland) AG Zurich focused on international structuring, tax compliance and tax related aspects and was the department's representative in Zurich for numerous years.

Roderik holds a BA (incl. business economics, law and tax law) with a major in marketing, a certification in investment counselling, an MBA in international marketing and an EMBA in international business. Furthermore, Roderik has embarked in a mixed methods study focused on key trust influencing factor in a Swiss family office-bank trust relationship. He has been a full STEP member since June 2008 and joined the STEP Zurich committee in December 2010, where he currently acts as its Chairman. He is also chairing Verein STEP until the next AGM in 2018.

April 18/cg