An Invitation

Bridging the Gap
Full Day Seminar for Private Banking Relationship Managers and Trust Officers

THROUGH ACTIVE PARTICIPATION AND TOOLS SUCH AS LAWINCONTEXT’S PRIVATE BANKING HELPDESK, ATTENDEES WILL FAMILIARIZE THEMSELVES WITH THE NEEDS OF WEALTH OWNERS

Andrew Law, CEO of International Protector Group, will facilitate this the one-day intensive learning course in The Bahamas. The program will comprise of live seminar and group work to apply the techniques and discussion lead by Mr. Law. The group work component of the program will be supplemented by access to the Private Banking Helpdesk by LawInContext.

We hope that you and your colleagues will be able to join us at either one of these venues.

Who We Are

LawInContext (www.lawincontext.com) provides cost-effective access to online legal information and training from the experts at the global law firm, Baker & McKenzie. LawInContext’s Helpdesks feature country-by-country access to selected topics in various areas of the law. Our online training modules are self-paced, multimedia programs that feature interactive exercises and quizzes with test results. Over 100 institutions rely on LawInContext Helpdesks, Alerts and Training Modules.

Date: September 30, 2008
Time: 8:30am - 5:00pm
Venue: British Colonial Hilton Hotel
Number One Bay Street
Nassau, The Bahamas
Room: Governor’s Ballroom

Date: November 11, 2008
Time: 8:30am - 5:00pm
Venue: SuperClubs Breezes Hotel
Cable Beach, West Bay Street
Nassau, The Bahamas
Room: Oceanview Room
### Agenda

**8:30 to 9:15**

- Coffee and Continental Breakfast Provided
- Registration and Introduction to the Training Program - AL
  - Overview of the course
  - Introduction of participants

**9:15 to 10:30**

- Why Should Relationship Managers & Trust Officers Work Together? - AL
  - The needs of the bank vs the fiduciary company
  - Understanding the clients needs vs the bank or fiduciary company
  - Marketing issues relevant to private banking products and services; price is not the issue
  - The role of knowledge in successful client acquisition and retention. The need for a group approach with appropriate sharing of knowledge and skills
  - Strategic planning for private banks and individual private bankers

**10:45 to 11:30**

- The Private Banking Toolbox and How it Can be Used – AL
  - Trusts and foundations: the pros and cons, and the attractions of the new Bahamas foundation offering
  - Insurance planning and the high net worth family
  - Mixing trust and insurance strategies
  - The U.S. dynasty trust and its use for both U.S. and non-U.S. connected families
  - The private trust company and how it works

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**11:30 to 12:30**

- Client Drivers: Understanding the Issues Clients Have and What is Important to Consider When Using the Private Banking Tools – AL
  - How to use the tools and non-tax considerations
  - Asset protection
  - Privacy
  - Succession planning
  - Forced heirship
  - Gift and inheritance taxes
  - Income taxes

**12:30 to 13:00**

- Lunch

**13:00 to 16:30**

- Interactive Group Assignment: Solving pre prepared Case Studies – Applying the Tools and Knowledge – Groups
  - Split into teams
  - Accessing the Private Banking Helpdesk
  - Present and discuss cases

**16:30 to 17:00**

- Wrap up and Close of Program

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**Places are restricted so early booking is advised. Your place will be confirmed prior to the event.**
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To book your place, please complete this form and return it together with your payment to Tanya Thompson. Alternatively fax to +1 242 677 8701 or email info@ipg-protector.com.

☐ I would like to attend the seminar on Tuesday, 30 September 2008
☐ I would like to attend the seminar on Tuesday, 11 November 2008

Name: ________________________________________________________________

Position/Title: _________________________________________________________

Company: _____________________________________________________________

Address: _____________________________________________________________

Tel. No. __________________ Fax No. __________________

E-mail Address: ________________________________________________________

Conference Fee: $195

☐ Enclosed is a cheque made payable to International Protector Group Ltd for $ ______________________

Cancellations
Due to site bookings and other commitments, refunds cannot be made for cancellations received after 5 days prior to the seminar. We will accept replacement participants provided we receive notification prior to the start of the conference.

Please return this reply slip to:
International Protector Group Ltd.
Montague Sterling Centre
P.O. Box N-3924
Nassau, Bahamas

Attention: Tanya Thompson
E-mail: tanya.thompson@ipg-protector.com