Thursday, July 16th , 2026 – ONLINE EVENT

STEP is organising a webinar, which will be held on **Thursday, July 16th , 2026** online: the link will be sent to those registered **one day before the event**. The Event starts **at 14:00** and will last for about an hour and fifteen minutes.

Moderator: **Marc Blumenfeld** - Founder of Alithis AG, Zurich

Confirmed Panellists:

Thomas Roullet - Partner at Eversheds Sutherland Ltd, Geneva

Barbara Neuerburg – CEO & Founder of Taidos AG, Zug

Filippo Turato - Partner at Capital Trustees AG, Lugano

Tobias Eberle - CEO of VQF, Zug

The webinar will be in English on the topic:

FORTHCOMING SWISS TRANSPARENCY REGISTER AND CHANGES TO AMLA IMPACTING PROFESSIONAL ADVISORS

A webinar presented by the technical committee of STEP in Switzerland and Liechtenstein. The webinar is designed for all STEP members and friends, in particular those practising in the region. It will provide a briefing on the key points of the transparency register and AMLA changes which will come into effect on 1 October 2026, so no time to lose. A panel of expert speakers will be covering the topics, moderated by Marc Blumenfeld from STEP Zurich.

Marc Blumenfeld is a Swiss attorney who has over 10 years of experience in the wealth planning, trustee and corporate services business working for independent and bank-owned trustees. As a board member and in-house counsel of different organisations, Marc has also gained relevant experience in the non-profit and sports sector.

Thomas Roullet - advises and assists a broad spectrum of clients, ranging from start-ups and family-owned businesses to multinational listed groups, with a particular focus on complex domestic and cross-border transactions.

His practice focuses on mergers and acquisitions, private equity, financial (re-)structuring and corporate governance. Thomas has extensive experience advising strategic buyers, institutional investors, and management teams throughout the entire transaction lifecycle, from structuring and negotiation to post-closing integration.
In parallel, Thomas advises private clients on the structuring, protection, and transmission of their business and personal assets. His work in this area extends to cross-border investments, real estate acquisitions, estate planning, and relocation matters.
Active in the associative world, Thomas is a member of the Geneva Bar Association (OdA), the Swiss Bar Association (FSA) and the International Association of Young Lawyers (AIJA).

Barbara Neuerbug is driven by a passion for helping businesses thrive. With over 20 years of international experience in the legal and corporate services field, she founded Taidos in 2023 to simplify her clients' lives, so they can focus on what truly matters: growing their business.
At Taidos, Barbara is a bridge builder – connecting people, ideas, and opportunities across boundaries. She is a problem-solver and catalyst for change, guiding clients through new or complex terrain with insight and foresight.
She fully believes in building trusted partnerships by delivering ordinary services extraordinarily well. Originally from Germany, her journey has taken her across Luxembourg, UAE and Switzerland, where she has led teams, expanded operations, and ensured global clients stay in good legal standing.
As a lawyer, trained mediator, and entrepreneur, Barbara's mission is clear: to provide expert guidance, inspire individuals, and be a reliable partner in her clients' success.

Filippo Turato is a Partner and member of the Executive Committee at Capital Trustees AG. He specializes in the implementation of complex multinational wealth planning solutions for high-net-worth families, advising clients across Europe, LATAM and Middle East, while also managing relationships with institutional partners. Prior to joining Capital Trustees AG, Filippo developed extensive experience in trust and wealth structuring at a leading Italian law firm. He is a regular speaker at international conferences and contributes to academic and professional publications. He is recognized for his contributions to the Swiss trust industry, particularly in relation to the regulatory framework applicable to professional trustee and the use of private trust companies in Switzerland.
Filippo holds a Law degree from Luigi Bocconi University of Milan. He is Chair of STEP Lugano and former Chair of STEP Verein, and serves on various committee of the Swiss & Liechtenstein STEP Federation.

Tobias Eberle is CEO, SRO VQF | Board Member, Forum SRO

- Born and raised in Zug, Switzerland, Tobias has been active in the financial sector since 2010. Before joining VQF, he spent more than six years with PwC and more than six years with Luzerner Kantonalbank.
- As CEO of VQF, he is currently leading the implementation of the Swiss adviser licensing regime ("Berater-Unterstellung") and the organisation's preparations for Switzerland's upcoming FATF mutual evaluation.
- VQF is one of Switzerland's largest self-regulatory organisations (SROs), with around 600 members covering a broad range of financial intermediaries, including approximately 170 virtual asset service providers (VASPs). The organisation is headquartered in Zug and employs nine specialists.

Registration:

To register please go to our website: **http://www.step-geneva.org**

Price of the event is **CHF 40** for STEP members **CHF 60** for non-members and **CHF 20** for STEP Diploma Students), payable in advance by credit card or transfer to our UBS bank account specified on the invoice.

Registrations and payment must be received at least 24 hours before the event. Cancellations in writing must be received by the Secretariat at least 24 hours before the webinar, the replacement could be done any time.

This event counts as "*1 structured CPD hour*".

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