

Invitation: One Day Course

# CZECH TRUSTS AND FOUNDATIONS

We are pleased to invite you to a one-day course exploring the current state of the Czech wealth planning market and the opportunities and intricacies of Czech trusts (svěrenské fondy) and foundations (nadační fondy). Join us in extending your knowledge of this important emerging jurisdiction for wealth management: The Czech Republic.

## WHY ATTEND?

This course is aimed at private bankers, fiduciaries, legal advisors, and wealth management professionals who work with Czech clients. Knowledge of the domestic environment and the available local structures is an essential part of developing comprehensive solutions for these clients.

This course is designed for practitioners who already have a good core understanding of trusts and foundations and how they are used in wealth management. This course focuses in particular on the unique aspects of the Czech environment.

## TOPICS INCLUDE:

- Context – current state of Czech wealth and family succession
- The history and legal evolution of succession planning, trusts and foundations in Czechia
- Key legislative and theoretical foundations
- Their implementation into Czech law
- Key fund documents
- The Czech registers (Trusts, Foundations, UBO)
- Initial market reception and evolution to current position
- How they have been used in practice since inception
- Trustee responsibilities
- Court decisions
- Purpose Trusts
- Tax considerations and cross-border implications
- Suitability for Non-residents
- Relative benefits/disadvantages of non-Czech structures (e.g. vs. Liechtenstein Foundations)
- What we expect in the future

## AT A GLANCE

### DATE

24 September 2025

### LOCATION

Zurich (venue TBA)

### COURSE FEE

CHF 900



## JAMES TURNBULL, LLB, TEP

James has been involved with Czech trust and foundation structures since their inception, including founding the Czech Republic's first specialist trust company, **Svěrenské fondy a trusty s.r.o.**

He co-authored the authoritative Czech textbook **Svěrenské fondy – krok za krokem** and served as contributing editor of **Trust Laws in the Czech Republic and Hungary**. James is a board member of the Czech Trusts Association (**APRSF**) and chairs the Czech and Slovak chapter of **STEP** (Society of Trust and Estate Practitioners).

## FURTHER DETAILS

Course runs from 09:00 - 16:00 with a one-hour break for lunch.

Alternative dates and in-house presentations in other locations are available upon request.

Register at: [info@uplift.cz](mailto:info@uplift.cz)