

**How family philanthropy enables wealth preservation**

**STEP LUNCH MEETING / ZURICH CENTRE**

**SPEAKER**

Caroline Piraud, Head Philanthropy Services at  
VALUEworks AG Zürich  
[www.valueworks.ch](http://www.valueworks.ch)

**DATE**

Wednesday, 23rd September 2015

<b>TIME</b>	12.00 – 14.00 hrs.
Registration	11.45 – 12.00 hrs.
Talk and Questions	12.00 – 13.00 hrs.
Lunch and Coffee	13.00 – 14.00 hrs.

**VENUE**

Hotel Glockenhof Zürich  
Sihlstrasse 31, 8022 Zürich, 044 225 91 91  
[www.glockenhof.ch](http://www.glockenhof.ch)

**SUPPORTED BY**



**REGISTRATION**

by 21st September 2015

to [events@step-ch-fl.com](mailto:events@step-ch-fl.com)

**CPD**

1 hour towards CPD obligation

<b>FEE</b> (incl. VAT 8 %)	CHF
Members	80.00
Non-Members	100.00
STEP Students	50.00

**CONDITIONS**

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

Yours sincerely,  
**STEP Office Zug**

Corinne Graf  
Administration/Events

## STEP LUNCH MEETING / ZURICH CENTRE

Hotel Glockenhof Zürich / 23<sup>rd</sup> September 2015 / 11.45 hrs.

### INTRODUCTION

Kecia Barkawi, VALUEworks, provides an update on the STEP SIG Philanthropy.

VALUEworks is an award-winning multi-family office dedicated to serving global families engaged in responsible wealth creation. Through a holistic approach, it advises and supports international wealth holders in navigating today's increasingly complex legal and financial landscape. Its highly personalized family office services provide strategic direction, alleviate administrative burdens, and strengthen the family as wealth owner.

### SPEAKER

With over a decade of experience in the private client industry, Caroline heads VALUEworks' philanthropy advisory services and is in charge of the management of charitable foundations. In addition, she advises our clients, in particular business families, on family governance. She has a law degree from the University of Zurich, holds the Swiss Federal Bar admission as well as a LL.M. from New York University, School of Law. Caroline also completed the professional foundation management course of the Centre for Philanthropy Studies (CEPS), University of Basel.

### TOPIC

#### How family philanthropy enables wealth preservation

In this session, Caroline Piraud, who heads Philanthropy Services at VALUEworks, explains how family philanthropy can be a vital element in the service offering of trust and estate practitioners and other private client managers.

Conventionally, philanthropy has been seen as a one-way transaction, where families of wealth gift and bequeath substantial treasures to organisations and causes. Caroline aims to broaden this mindset to look at family philanthropy as an effective tool for wealth preservation, making its members more motivated and energized to continue the dynamic process of building and preserving family wealth throughout generations. She further discusses various philanthropy mechanisms and structures that can be integrated into a family's wealth planning and management strategy.

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July 15

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