



**MALTA STOCK EXCHANGE
INSTITUTE**

**TOWARDS A
BRIGHTER
FUTURE**



Understanding Trusts

Course No 311

Participants will learn how trusts are a legal relationship created by one party and places assets under the control of another party referred to as the trustee for the benefit of the beneficiary. Participants will learn the intricacies of trusts and the legal and tax ramifications of their set-up. There will also be discussions related to how to properly create trust deeds and articulate the powers of trustees. Attendees will learn why trusts are formed, such as for the protection of assets or estate planning, and why trustee independence helps avoid any suggestion that the settlor continues to have control of the trust assets.

Supported by:



Sample Topics Covered:

The setting up of trusts

Probate and charitable giving

Wealth legacy planning

Maltese trust tax treatment

The trustee, settlor, protector and beneficiary

The trust deed

Types of trusts

Express trusts and implied trusts

Constructive trusts

The Maltese regulatory environment for trusts

The minimisation of estate taxes

Practical issues of trust creation

Imposition of conditions on the distribution of assets following the settlor's death

Protection of assets from claims and creditors

Drafting of trust deed

Malta Trusts and Trustees Act

The preservation of assets until minors reach majority age

Applicant Name

Applicant ID Card

Applicant Mobile Number

Applicant Email Address

Invoice is to be issued in the name of:

the Applicant or Organisation

If Invoice is to be issued in the Entity's name, please input the details below marked with (*)

Organisation Name(*)

Organisation Email Address
(where invoice will be sent) (*)

Organisation Purchase Order No.
(if applicable)

Address of Organisation on which the invoice is to be issued (*)

Registration fee: **€125 per participant**

Discount (tick only if applicable)

- Full time student (50% discount)
 Senior citizen (50% discount)
 Group booking of 4 or more applicants
from the same Organisation (10% discount)

I would prefer to attend the course online classroom

Classroom courses will only be held if we have at least 4 persons in the classroom.

The data completed above is being compiled to enable the MSE Institute to communicate with you about the course when necessary.

Terms and conditions: Applicants who are registered for the course are not entitled to a refund if they are unable to attend, but may assign their booking to a 3rd party subject to confirmation by the MSE Institute.

Malta Stock Exchange Institute Ltd.

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General Information

Time: 09.30 - 12.00hrs

Venue: Malta Stock Exchange
Subject to COVID-19 related restrictions
Online

Level: Intermediate

Schedule

Duration: 5 hours

Dates: 23, 24 March

Target Audience

This course requires attendees to have an understanding of basic financial concepts. The public, students, compliance officers, directors, industry practitioners, lawyers and accountants are invited to attend.

Lecturer

Dr Priscilla Mifsud Parker



Dr Mifsud Parker is a private client lawyer heading Chetcuti Cauchi Advocates Families and Wealth practice group. In this capacity, she specialises in trusts and estate planning, wealth and business structuring for high net worth and successful business families. In the structuring field her main speciality is tailor-made solutions for the optimisation and protection of high value assets. Priscilla's background and experience in corporate, trusts and tax law enables her to assist clients in overcoming their challenges when structuring their wealth. Priscilla also heads the Corporate and Trust Services arm of the firm which handles the setup and administration of the corporate structures designed by the law firm for clients. Her practice revolves around assisting clients in business start-up stage or with acquisitions, corporate restructurings, shareholder matters and providing day to-day company law and tax advice to companies under the firm's administration. She received a B.A. in Law and Theology, LL.D. Trusts Law and M.A. in Financial Services from the University of Malta.

Cheques to be made payable to: Malta Stock Exchange Institute Ltd.

Payments by bank transfer

Bank: Bank of Valletta plc
IBAN Code: MT04VALL22013000000040025119059
IBAN BIC: VALLMTMT

Kindly insert your NAME, SURNAME, ID CARD NUMBER and COURSE NUMBER in the transaction narrative.

This application is to be accompanied by payment or proof of payment by bank transfer.