SENIOR LEADERSHIP · JERSEY & GUERNSEY

The Fiduciary Forum

The decisions that define fiduciary leadership.

A senior leadership forum for Jersey and Guernsey’s trust and corporate services businesses.

Jersey · Tuesday 20 April 2027 · Guernsey · Thursday 29 April 2027 · Venues to be announced

Jersey · Tuesday 20 April 2027 · 14:00–17:30, refreshments from 17:00

Guernsey · Thursday 29 April 2027 · 09:30–13:00, light refreshment buffet from 12:20



Illustrative continuity architecture

Convened by SpringStone Events, in collaboration with SIFS — School of International Financial Services.

Chris Usher · Managing Director, SIFS

Chris Usher brings experience in professional education and event chairing. He chairs the Forum’s decision-led conversation, connecting practitioner judgement with substantive expert perspectives.

Speakers, partners, venues and prices remain unconfirmed. Announcements follow confirmation.

INTENDED AUDIENCE

Practitioners with decision-making responsibility

Intended audience, selected through an invitation-led approach with a strong fiduciary-practitioner majority. Capacity and attendance targets will be confirmed with the organisers; no firms or attendance counts are confirmed.

Independent trust firms; International fiduciary groups; Private-client and family-office service businesses; Corporate-services providers; Fiduciary administration leadership teams

CEOs and managing directors; Chairs and board members; Trust and client directors; COOs and operations leaders; Technology and data leaders; Senior risk and compliance leaders; Investment-governance decision-makers, where relevant

Explore the audience: thefiduciaryforum.com/who-attends

THE PROPOSED PROGRAMME

A decision-led programme

Two linked 30-minute keynotes and two 30-minute panels. Each panel has three experts and an independent moderator. All sessions are proposed pending contributors.

GUERNSEY · JERSEY	SESSION
09:30–10:00<b r/>14:00–14:30	Arrival Arrival, coffee and peer networking 30 minutes · not learning time
10:00–10:30<b r/>14:30–15:00	Keynote 1 · Chapter I Defensible decisions: the modern trustee’s judgement 30 minutes · formal learning
10:30–11:00<b r/>15:00–15:30	Panel 1 · Chapter I Protecting client wealth: difficult decisions, investment oversight and fiduciary risk. 30 minutes · formal learning
11:00–11:20<b r/>15:30–15:50	Break Break 20 minutes · not learning time
11:20–11:50<b r/>15:50–16:20	Keynote 2 · Chapter II Building a resilient fiduciary business: profitable growth with effective control 30 minutes · formal learning
11:50–12:20<b r/>16:20–16:50	Panel 2 · Chapter II The profitable fiduciary firm: growth, technology and control. 30 minutes · formal learning
12:20–13:00<b r/>16:50–17:30	Close Closing networking and light refreshment buffet 40 minutes · not learning time

LEARNING TIME

120 minutes of formal learning

2 hours of live learning (120 minutes). A further 40-minute learning module is planned; it is optional and not yet available. Record only relevant learning you complete under your employer’s or professional body’s rules. Attendance records are planned. No accreditation or endorsement by STEP, JFSC or GFSC.

Arrival and closing networking total 70 minutes; the break is 20 minutes. None of this general networking or break time counts as CPD.

Research links and locally tailored Jersey/Guernsey prompts are available in the web programme. Sources inform editorial choices; they are not endorsements.

WORKED DECISIONS

Two substantive conversations

CHAPTER I

Client wealth and fiduciary judgement

• How should trustees balance competing distribution wishes against illiquidity and investment concentration?

• Which valuation, tax and investment advice is needed before a defensible decision can be made?

• How should a related-party appointment be challenged, managed and evidenced?

COMPOSITE FICTIONAL SCENARIO

A trust holds an illiquid family business. Beneficiaries disagree over distributions and investment diversification. A related party offers a service appointment while concentration and valuation remain uncertain. The trustees must distinguish their trust duties from cross-border tax and specialist investment advice, test the appointment and document the decision.

Learning outcomes: Assess discretion, conflicts and investment oversight in difficult client decisions. Identify the specialist advice, escalation and evidence needed for a defensible decision.

Perspectives: Fiduciary practitioner, legal and tax/advisory, with banking or investment-governance expertise as appropriate.

CHAPTER II

A profitable, controlled fiduciary firm

• Which growth option fits the firm’s risk appetite and client concentration?

• Should capacity come from acquisition, outsourcing or technology, and who remains accountable?

• What evidence should the board demand on costs, succession and resilience?

COMPOSITE FICTIONAL SCENARIO

A fiduciary firm faces rising costs, a concentrated client base and the retirement of a senior leader. Its board considers an acquisition, outsourcing and a technology investment. The discussion makes three decisions: growth and risk appetite; operating capacity and technology; board oversight and resilience.

Learning outcomes: Evaluate growth, capacity and client concentration against the firm’s risk appetite. Challenge technology and outsourcing controls, board assurance and financial resilience.

Perspectives: Experienced fiduciary practitioner, technology/operating-model and governance/advisory expertise, complemented by financial perspectives where relevant.

WHERE EXPERTISE FITS

Client and business decisions, separately

Decisions for the firm

Operating systems, onboarding, banking, assurance, insurance and professional advice bought for the fiduciary business. Group procurement may sit outside the island; local leaders shape needs and relationships.

Decisions for client structures

Professional appointments, banking and investment oversight within client entities and trusts, subject to duties, governance and specialist advice. Influence is not a guaranteed mandate; client assets are not the firm’s spending budget.

EXPERTISE	BUYER NEED / PROFESSIONAL RELEVANCE
Legal	Trustee discretion, structuring, succession, disputes and regulatory advice. Defensible client decisions and independent challenge.
Tax, accountancy & advisory	Client tax and reporting, assurance, transaction due diligence and operating models. Specialist cross-border input and stronger business evidence.
Banks	Client and entity banking, liquidity, payments and financing. Reliable banking arrangements and liquidity decisions.
Investment & governance	Manager selection, monitoring and defensible investment oversight. Challenge concentration, valuation and investment suitability.
Core technology & RegTech	Administration, client accounting, onboarding, ownership data and compliance workflow. Capacity and control without surrendering accountability.
Insurance, cyber & specialists	Firm and client-asset protection, managed IT, transaction support and operational resilience. Protect continuity and assess specialist risk.

Demonstrate how your expertise helps fiduciary leaders make better client and business decisions. No client-asset total is a proxy for the firm’s spending budget. Mandates and introductions are not guaranteed.

PROPOSED PAID CAMPAIGNS

Three tiers, clearly defined

Forum Partner

One chosen island

Panel contribution by a suitable senior expert under editorial agreement, within existing allocations.

- Agreed website and event recognition and profile
- 2 delegate places proposed
- Forum networking
- Suitable senior expert panel contribution, by editorial agreement

Programme Partner

One chosen island

Linked 30-minute keynote AND seat on the corresponding 30-minute panel, subject to expert suitability and editorial agreement.

- Profile and 4 delegate places proposed
- Agreed campaign communications
- ONE separately scheduled SIFS-hosted topical webinar
- ONE co-developed substantive article
- Linked keynote and corresponding panel seat

Cross-Island Partner

Jersey and Guernsey

Programme benefits across both islands using existing agreed keynote and panel allocations, not additional inventory.

- Programme benefits across both islands
- 4 delegate places per island proposed
- Shared campaign of ONE webinar and ONE article across both islands
- ONE targeted small-group roundtable, subject to capacity and agreement

Proposed paid packages, not confirmed contracts. Prices on enquiry. Deliverables, capacity, expert suitability and editorial agreement are finalised in writing. Category protection is discussed within an agreed scope, never assumed blanket exclusivity. No mandates, meetings or introductions are guaranteed.

Forum Partner includes no webinar, article or roundtable. Cross-Island shares ONE webinar and ONE article across both islands; these are not duplicated.

EDITORIAL BALANCE

Complementary voices. Defined allocations.

Maximum proposed speaking inventory per island: two Programme allocations and four additional panel allocations. Each panel has three experts and an independent moderator, including an experienced fiduciary-practitioner voice. Invited practitioner seats may reduce commercial panel inventory. Cross-Island uses existing agreed allocations; it creates no additional keynote or panel places. Availability on enquiry.

Client wealth and fiduciary judgement

Fiduciary practitioner, legal and tax/advisory, with banking or investment-governance expertise as appropriate.

A profitable, controlled fiduciary firm

Experienced fiduciary practitioner, technology/operating-model and governance/advisory expertise, complemented by financial perspectives where relevant.

Independent moderation and an experienced practitioner voice are part of the format; no commercial places are shown as reserved or available.

EDITORIAL STANDARDS

Expertise, not a product pitch

Expertise first: Contributions are selected for substance and relevance to senior fiduciary leaders.

Case-led education: Practical scenarios and decisions, not product presentations.

Disclosure: Paid participation is disclosed to delegates.

Independent moderation: Each panel has an independent moderator.

No sales pitches: Sessions are educational. No regulatory endorsement is implied or claimed.

Delegate privacy: No delegate list is sold or shared automatically. Introductions are made only with permission.

NEXT STEP

Discuss the right contribution

Choose an island, proposed package and expertise perspective. The organisers will discuss fit, availability, category scope and written agreement.

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thefiduciaryforum.com/partnerships

Enquiries are recorded privately. Interest and proposed inclusions do not create a booking or contract.