

Digital Assets (Cryptoassets and «Digital Remains»): Planning, Tax and Practical Considerations

> What private clients and wealth advisors need to consider with this new asset class: property rights, conflict of laws, AML/source of funds, tax...

> How to handle digital assets in the context of asset protection and succession/tax planning

SPEAKERS



Ben Rosen,
Partner, Head of the Private
Wealth & Tax team
Quastels LLP, London



Jack Burroughs TEP,
Senior Associate,
Quastels LLP, London

PROGRAMME

Ben Rosen and Jack Burroughs from Quastels LLP, a London-based law firm, will be presenting on the topic of digital assets and what private clients and their advisors need to consider with this ever-evolving asset class. In this seminar they will be exploring how to handle cryptoassets as well as other types of digital asset in the context of asset protection and succession/tax planning, with a particular focus on complex, multi-jurisdictional issues.

14.00 What are digital assets? Basic terminology and overview of how they work

- Cryptoassets
- Digital files
- Cloud accounts

14.15 Tax and estate planning of Cryptoassets: issues, solutions, case study

- Property rights
- Situs/conflict of laws

Ben Rosen is a partner and head of the Private Wealth & Tax team at Quastels in London, a team that has been ranked and recognised by The Times, Legal 500 and Spears. Ben specialises in private wealth and tax matters for both UK and international high net worth individuals and families. Ben has a particular focus on complex multijurisdictional tax and structuring matters and also advises on the interplay between wealth and emerging technologies such as blockchain and artificial intelligence.

- Practical succession planning
- Trusts of cryptoassets
- FICs and cryptoassets
- Tax and cryptoassets
- AML/source of funds
- Handling cryptoassets in estate administration
- Case study

15.45 Coffee break

16.05 Estate planning of 'Digital Remains': tasks, solutions, case study

- First steps – the digital asset inventory
- Succession/incapacity planning
- Handling digital remains in estate administration
- Case study

16.40 Questions and Answers

17.00 End of the seminar

Jack Burroughs TEP is a tax, trust and estate advisor at Quastels LLP in London, advising clients around the world. Jack is known for his expertise in relation to new technology and cryptoassets and provides advice on these issues. He co-authored the second edition of legal textbook The Digital Estate, which covers the legal, tax and practical implications of all kinds of digital assets from the perspective of private client practice. He also serves as Deputy-Chair to the Steering Committee of STEP's Digital Assets Global Special Interest Group, and regularly speaks at events on the topic. Most recently, he authored STEP's CPD Learning Course on Digital Assets.

GENEVA, WEDNESDAY 25 MARCH 2026, HOTEL PRESIDENT, 14.00-17.00 /ONLINE

INFORMATION & REGISTRATION

Tel: +41 22 849 01 11
info@academyfinance.ch
Academy & Finance SA
PO Box 3039, 1211 Genève 3
www.academyfinance.ch

FEE

560 CHF (+ 8,1% VAT)
Additional participants from the same
company: -50%

AF 1476

I register to the seminar on "Digital Assets" on 25 March 2026.

☐ I will attend in the conference room

☐ I will attend online on Zoom.

Full name

Position Company.....

Address

Zip code/City

Tel Mobile.....

E-mail.....

Date Signature.....