ACADEMY & FINANCE

A British Jurisdiction in Cyprus.

Wealth Planning You've Never Heard Of

Confidentiality and Asset Protection From British Sovereign Territory

in the Sovereign Base Areas of Cyprus

The Connaught, London, 15 September 2026, 5.00-8.00 pm

Registration and welcome refreshments 5.00 pm
Briefing 5.30 pm to 7.00pm - Post briefing supper reception

SPEAKER

Mark Morris

Mark Morris has spent over two decades constructing proprietary trust architectures. He has advised the European Commission, the European Parliament and national competent authorities on automatic exchange of information; testified at the Bundestag on the Swiss-German tax treaty; and consulted with Pascal Saint- Amans at the OECD. He appeared on BBC Panorama's Paradise Papers investigation in November 2017. The Economist has covered his work on four occasions. He operates through East West Management GmbH, Zurich.

Architect of the Polar Bear (UK), Lionheart (Sovereign Base Area), Arctic Kiwi (New Zealand) and Red Panda (Hong Kong) Trusts. Introduced the five-gate asset protection strategy.

For background information Google: Mark Morris CRS Svalbard. www.co-ownershiptrust.com

PROGRAMME

1. The jurisdiction — the Sovereign Base Areas (SBA), British sovereign territory in Cyprus, with its own trust-law framework continued in force separately from the Republic of Cyprus, England and Wales, and mainstream offshore jurisdictions; recognised under UK law via Schedule 2 of the Recognition of Trusts Act 1987 (Overseas Territories) Order 1989, which applies the Hague Trusts Convention to SBA law.

2. The court issue — a recognised, SBA-governed trust may still leave a claimant without an obvious conventional court or a straightforward enforcement route

3. Portability — decanting lets a trustee anywhere retain the client rather than losing them to the original trustee, with Svalbard as the non-resident trustee jurisdiction at formation

4. Confidentiality — even after decanting, retained throughout rather than traded away

5. Technical compliance — how an SPV Custodial Institution can sit outside participating CRS architecture, examined against the mandatory disclosure rules

6. Putting it together: the Five Gate Strategy — most asset protection relies on one strong statute, like the Cook Islands'; this instead builds friction across five separate points a claimant must clear in turn — bank, company, director, trust jurisdiction and trustee

Meet with Mark Morris for one-to-one technical guidance on the broad range of wealth planning strategies with Lionheart trusts.

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VENUE
The Connaught, Carlos Place,
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FEE
£390 in person; £190 online.

Places are strictly limited. This event will not be repeated. You can watch the Zoom recording of the briefing anytime you want.

I register for the Professional Briefing on 15 September 2026.

☐ I will attend in the conference room ☐ I will attend online on Zoom.

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