



Information Sheet: Foundations and Trusts (spring semester 2024)

1. Schedule

The course is held by three lecturers in three blocks.

Date	Time	Topic	Lecturer	
27.2.2024	14.00–18.00	<i>The big picture: World of foundations and trusts</i>	Dominique Jakob	
		<i>Foundations:</i> <ul style="list-style-type: none"> • <i>The different concepts of foundations</i> • <i>Swiss foundations</i> • <i>Liechtenstein foundations</i> 		
5.3.2024	14.00–18.00	<i>Introduction to estate planning via foundations from a Swiss perspective</i>		
13.3.2024	14.00–18.00	<i>Overview of common law foundations in selected jurisdictions</i>		Michelle Kalt
20.3.2024	14.00–18.00	<i>Trusts:</i> <ul style="list-style-type: none"> • <i>Introduction to the concept of trusts</i> • <i>The recognition of trusts from a Swiss perspective</i> • <i>Trusts in Swiss (inheritance) proceedings</i> 		
		9.4.2024		
16.4.2024	14.00–18.00	<i>Taxes:</i> <ul style="list-style-type: none"> • <i>Overview</i> • <i>Taxation of foundations from a Swiss perspective</i> • <i>Taxation of trusts from a Swiss perspective</i> 	Natalie Peter	

2. Lecture material

Lecture materials will be announced by each lecturer at the beginning of his/her lecture block. All materials will be made available on the homepage of Prof. Jakob's chair.

3. Learning objectives

The learning objectives are listed in the document "Learning Objectives Foundation and Trusts".

4. Exam

The course ends with an exam. The examination modalities will be announced in due course.

5. Further information

For information on the schedule of the course (not the content of the individual blocks), please contact lst.jakob@ius.uzh.ch.