

# STEP NEW ZEALAND CONFERENCE 2025

## FAMILY MATTERS: MULTIGENERATIONAL ASSET PLANNING

**We are on the cusp of a significant generational wealth transfer. The need for practitioners to take a multi-faceted, and multi-generational, approach to asset planning is growing. Join us for insights on how to manage family dynamics and family enterprise in times of change, as well as updates on topical tax and philanthropy issues.**

Register today to connect with fellow STEP members and leading industry professionals as we meet for a dynamic one-day event designed to inform and inspire. Hear from distinguished speakers as they share expert insights, practical guidance, and emerging trends shaping the trusts and estates landscape. Don't miss this opportunity to stay ahead, strengthen your network, and enhance your professional practice.

### EVENT DETAILS

**Date:**

Friday, 10th October 2025

**Times:**

CONFERENCE: 9:00am – 5:30pm

PRE DINNER DRINKS: 5:30pm – 6:30pm

CONFERENCE DINNER: 6:30pm – Late

**Venue:**

Wintergarden Room, The Northern Club,  
19 Princes Street, Auckland City 1010

Please note dinner is an additional cost of \$139.00 + GST.

### SPEAKERS



**Emma Woolley**  
PARTNER  
Hall & Wilcox Melbourne



**Juliet Moses**  
PARTNER  
TGT Legal



**Evana Lithgow**  
MANAGING PARTNER  
Working Minds.co.nz



**James Scullin**  
SENIOR LEGAL COUNSEL  
Todd Family Office



**Terry Baucher**  
DIRECTOR  
Baucher Consulting Ltd



**Wendy Aldred KC**  
Stout Street  
Chambers



**Daniel Ryan**  
REGIONAL MANAGER  
ANZ



**David Cooper**  
CEO  
Malcolm Pacific

**Register using the form overleaf or online at  
[www.stepnz.org/registration](http://www.stepnz.org/registration)**

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### Program Timetable

Friday 10th October 2025

8.00am – 9.00am	Registrations open	
9.00am – 9.05am	Introduction <i>Alison Gilbert</i> – STEP NZ Chairperson	
9.05am – 10.00am	KEYNOTE ADDRESS: Creating Harmony in Family Business <i>Emma Wooley TEP</i> , Partner, Hall & Wilcox, AUS	
10.00am – 10.55am	Understanding the Active Investor Plus Visa for Migrant Investors <i>David Cooper</i> , CEO, Malcolm Pacific and <i>Daniel Ryan</i> , Regional Manager, ANZ	 
10.55am – 11.15am	MORNING TEA	
11.15am – 12.10pm	What's Happening in Philanthropy <i>Juliet Moses TEP</i> , Partner, TGT Legal	
12.10pm – 1.05pm	Tax Panel <i>Terry Baucher TEP</i> , Director, Baucher Consulting	
1.05pm – 2.00pm	LUNCH	
2.00pm – 2.55pm	What is a Family Office? <i>James Scullin</i> , Senior Legal Counsel, Todd Family Office	
2.55pm – 3.55pm	PPPR Act Issues: proceedings for persons lacking capacity <i>Wendy Aldred KC</i> , Stout Street Chambers	
3.55 – 4.10pm	AFTERNOON TEA Proudly sponsored by Brookfields	
4.10pm – 5.05pm	Transitioning Trust: the human dynamics of succession, transition and change <i>Evana Lithgow</i> , Managing Partner, Working Minds.co.nz	
5.05pm – 5.30pm	Q&A Panel	
5.30pm	CLOSE	
5.30pm – 6.30pm	Drinks and canapés, The Northern Club	
6.30pm – Late	Conference Dinner, The Northern Club	

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Register online at [www.stepnz.org/registrations](http://www.stepnz.org/registrations) or complete the form below  
and email to [megan@allsortedlifestyle.co.nz](mailto:megan@allsortedlifestyle.co.nz)

### Personal Details

Title: \_\_\_\_\_ First Name: \_\_\_\_\_

Surname: \_\_\_\_\_

Designation: \_\_\_\_\_

Preferred Name on Badge: \_\_\_\_\_

Firm: \_\_\_\_\_

Position: \_\_\_\_\_

Department: \_\_\_\_\_

Postal Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Tel No: \_\_\_\_\_

Fax No: \_\_\_\_\_

Email: \_\_\_\_\_

### Registration Fee

Please tick corresponding box.

<input type="checkbox"/> <b>STEP Members &amp; STEP Student Rate</b>	\$685 + GST
STEP Membership number _____	
<input type="checkbox"/> <b>CAANZ (TSIG) &amp; ETPC members</b>	\$750 + GST
<input type="checkbox"/> <b>Non-Members</b>	\$850 + GST
<input type="checkbox"/> Please tick box to receive information about becoming a member of STEP	

### Social functions:

**Please note: the Conference Dinner is an additional cost of \$139 + GST**  
(Please let me know if you will be attending the dinner and if you have dietary requirements)

Please specify if you wish to attend:

<input type="checkbox"/> Conference Drinks	5:30pm – 6:30pm
<input type="checkbox"/> Conference Dinner	6:30pm – late

### Payments – please tick option

☐ **Electronic Transfer**  
If paying by bank transfer please ensure all charges are covered and your invoice is quoted.

Payments to:	Kiwibank Limited, Wellington, New Zealand
Account Name:	Step Conferences Limited
Bank Account Number:	38-9011-0852568-00
Swift Code:	KIWINZ22
Reference Details:	Surname of attendee

We are unable to process payments by credit card.

All payment and registration queries:  
email [megan@allsortedlifestyle.co.nz](mailto:megan@allsortedlifestyle.co.nz)  
or phone Megan at +64 21 189 5546

### How did you hear about the conference:

☐ STEP New Zealand Branch ☐ Other (please specify) \_\_\_\_\_

☐ STEP Website \_\_\_\_\_

### Terms and Conditions

Conference documentation will be distributed at the event. STEP reserves the right to amend or cancel this conference where the occasion necessitates. In the event of cancellation a full refund of any registration fee will be made but STEP shall accept no further liability. Prices may be subject to change. This booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of the fees due. The conference language is English.

### Data Protection

Members of STEP are able to update their mailing preferences any time at [www.step.org/user/login](http://www.step.org/user/login). Non Members; if you do not wish to receive future mailings/emails from STEP, with details of our forthcoming events and programmes, please tick this box ☐  
Please note: we will not pass on your information to third parties, any mailings/emails you receive will be regarding STEP events and programmes.

## WE ARE STEP

STEP is the worldwide professional association for practitioners dealing with family inheritance and succession planning. STEP helps to improve public understanding of the issues families face in this area and promotes education and high professional standards amongst its members.

STEP has nearly 20,000 members across 95 countries from a broad range of professional backgrounds, including attorneys, accountants, trust specialists and other practitioners. Visit [www.step.org](http://www.step.org) to find out more.

