

STEP NEW ZEALAND CONFERENCE 2023

AN EVER CHANGING WORLD - TOPICAL TRUST ISSUES



Date:

Friday, 8th September 2023

Time:

9:00am – 5:30pm Conference
5:30pm – 6:30pm Pre dinner drinks
6:30pm – Late Conference dinner

Conference Venue:

A D Regatta Room,
The Pullman Hotel,
Corner Princes Street &
Waterloo Quadrant,
Auckland City 1010

Conference Dinner Venue:

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

The area of trusts & estates and personal wealth protection is constantly evolving and changing. The diversity of topics provided by our speakers for this year's STEP Conference reflect this evolution. STEP NZ is proud to present an eclectic selection of leading lawyers who will deliver thought provoking and forward looking papers, addressing not only where the law is now, but where the law may be heading.

SPEAKERS

- **Professor Gino Dal Pont**
University of Tasmania
- **Georgia Angus TEP**
Partner, Morris
- **Noel Ingram KC**
- **Juliet Moses TEP**
Partner, TGT Legal
- **Carmel Walsh**
Barrister, Bankside Chambers
- **Bill Gambrill**
Litigator, Martelli McKeeg
- **Andrew Steele TEP,**
Barrister, Steele Trust Disputes
- **Vicki Ammundsen TEP**
Director, Ammundsen Trust Law

Register using the form on the last page of this flyer or
online at <https://www.stepnz.org/registration>

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Program Timetable

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8.30am – 9.00am	Registrations open	
9.00am – 9.05am	Introduction <i>Alison Gilbert – STEP NZ Chairperson</i>	
9.05am – 10.00am	KEYNOTE ADDRESS: Ruling from the Grave: Conditions in Wills <i>Professor Gino Dal Pont, Faculty of Law, University of Tasmania AUS</i>	
10.00am – 10.55am	The scope of trustee powers, looking at the recent Privy Council decision Grand View Private Trust Company v Wong [2022] UKPC 47. <i>Georgia Angus TEP, Partner, Morris</i>	
10.55am – 11.15am	MORNING TEA	
11.15am – 12.10pm	Charities - Who has standing and/or looking at advocacy and political/cultural issues <i>Juliet Moses TEP, Partner, TGT Legal</i>	
12.10pm – 1.05pm	Quasi-Benjamin Orders: expanded jurisdiction to authorise administration of trust assets despite possible adverse third party claims <i>Noel Ingram KC</i>	
1.05pm – 2.00pm	LUNCH	
2.00pm – 2.55pm	Issues concerning PPPR Act including a précis of the issues raised in the Law Commission review and the practical issues of dealing with wayward attorneys under the current law <i>Carmel Walsh, Barrister, Bankside Chambers</i>	
2.55pm – 3.55pm	An Introduction to the Determination of Matters Governed by Islamic Law in Common Law Legal systems <i>Bill Gambrill Litigator, Martelli McKeeg</i>	
3.55 – 4.10pm	AFTERNOON TEA <i>Proudly sponsored by Brookfields</i>	
4.10pm – 5.05pm	A post Supreme Court hearing analysis of A, B and C v D and E Limited and fiduciary relationships <i>Andrew Steele TEP, Barrister, Steele Trust Disputes & Vicki Ammundsen TEP, Director, Vicki Ammundsen Trust Law</i>	 
5.05pm – 5.30pm	Q&A Panel	
5.30pm	CLOSE	
5.30pm – 6.30pm	Drinks and canapés, The Northern Club <i>Proudly sponsored by Martelli McKeeg</i>	
6.30pm – Late	Conference Dinner, The Northern Club	

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THE FUTURE OF TRUST LAW IN NEW ZEALAND

Registration Form

Venue: Regatta AD, The Pullman Hotel, Corner Princes Street & Waterloo Quadrant, Auckland City 1010

Register online at www.stepnz.org/registrations or complete the below form and email to 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.

- STEP Members & STEP Student Rate** \$585 + GST
STEP Membership number _____
- CAANZ (TSIG) & ETPC members** \$650 + GST
- Non-Members** \$750 + GST
- Please tick box to receive information about becoming a member of STEP

Social functions:

Please note: the Conference Dinner is an additional cost of \$90 + GST

Please specify if you wish to attend:

- Conference Drinks Friday, 8th September,
The Northern Club, 19 Princes Street, Auckland 1010
- Conference Dinner Friday, 8th September,
Wintergarden Room, The Northern Club,
19 Princes Street, Auckland 1010

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
or phone Megan at +64 21 189 5546

How did you hear about the conference:

- STEP New Zealand Branch Other (please specify) _____
- STEP Website _____

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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 to find out more.