

STEP NEW ZEALAND CONFERENCE 2018

TRUSTEES: ARE YOU PROPERLY MANAGING THE RISKS OF LITIGATION AND COMPLIANCE PENALTIES?

Date:
Thursday, 21st June &
Friday, 22nd June 2018

Location:
Regatta AD,
The Pullman Hotel,
Corner Princes Street &
Waterloo Quadrant,
Auckland City 1143

Trustees are under increasing risk of potential litigation from co-trustees, beneficiaries and interested parties, not to mention exposure to penalties for non-compliance with regulatory obligations under AML, CRS and FATCA.

Recent case law, tax/regulatory compliance developments and impending changes to legislation are enabling an expanded group of parties to question trustee decision making and penalise trustees for non-compliance.

This conference will cover various common law and legislative changes putting trustees and practitioners at risk.

SPEAKERS

- **Mark Herbert QC**, UK
- **Paul Heath QC**, New Zealand
- **David Marks QC**, TEP, Australia
- **Noel Ingram QC**, TEP, New Zealand
- **Professor Nicola Peart**, TEP, Faculty of Law, University of Otago
- **Vicki Ammundsen**, Director, Vicki Ammundsen Trust Law Ltd
- **Jeremy Johnson**, TEP, Partner, Wynn Williams
- **Gary Hughes**, Barrister
- **Terry Baucher**, TEP, Director, Baucher Consulting Ltd
- **Matthew Griffin**, Treasurer, Blockchain NZ
- **Jack Wass**, Barrister, Stout Street Chambers
- **Rebecca Rose**, Senior Associate, Bell Gully

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Program Timetable

DAY ONE: 21 June 2018

8.00 – 9.00am	Registration opens
9.00 – 9.05am	Introduction <i>Alison Gilbert, TEP, STEP Chairperson</i>
9.05 – 10.00am	Keynote address: A fond farewell to Rolls-Royce trust litigation? <i>Mark Herbert QC, Pump Court Tax Chambers, UK</i>
10.00 – 10.55am	Beddoes applications in trustee/beneficiary disputes – process and principles <i>Jeremy Johnson, Partner, Wynn Williams</i>
10.55 – 11.25am	NETWORKING & REFRESHMENTS
11.25 – 12.25pm	Seeking the Court's Blessing in New Zealand: In re PV Trust Services Limited <i>Noel Ingram QC, TEP</i>
12.25 – 1.25pm	LUNCH
1.25 – 2.20pm	Blockchain - what is it? And why would you want to own it? <i>Matthew Griffin, Treasurer, Blockchain NZ</i>
2.20 – 3.15pm	Accounting issues for cyber-currency <i>Terry Baucher, TEP, Director, Baucher Consulting Ltd</i>
3.15 – 3.35pm	NETWORKING & REFRESHMENTS
3.45 – 4.40pm	Update on AML <i>Gary Hughes, Barrister</i>
4.40 – 5.00pm	Perpetual Guardian Presentation <i>Richard Broad, TEP, Solicitor, Perpetual Guardian</i>
5.00 – 6.00pm	Pre-Dinner Drinks, The Northern Club
6.00pm	Conference Dinner, The Wintergarden Room, The Northern Club

DAY TWO: 22 June 2018

8.30 – 9.00am	Registration opens
9.00 – 9.55am	Trusts and Dispute Resolution <i>Paul Heath QC</i>
9.55 – 10.50am	Liquidators of Corporate Trustees – Australian Themes <i>David Marks QC, TEP</i>
10.50 – 11.20am	NETWORKING & REFRESHMENTS
11.20 – 12.15pm	When is a trust a trust? The validity of trusts and their interface with relationship property law <i>Prof. Nicola Peart, TEP, Faculty of Law, University of Otago</i>
12.15 – 1.10pm	The multi-jurisdictional trap: drafting wills and trust documents to manage cross-border issues <i>Jack Wass, Barrister, Stout Street Chambers</i>
1.10 – 2.10pm	LUNCH
2.10 – 3.05pm	How to decide - A critical assessment of the exercise of trustee discretion and matters for trustees to take into account when making decisions <i>Vicki Amundsen, Director, Vicki Amundsen Trust Law Ltd</i>
3.05 – 4.00pm	Trustees and dissatisfaction - what lessons can be learned from recent cases? <i>Rebecca Rose, Senior Associate, Bell Gully</i>
4.00pm	Keynote closing address <i>Mark Herbert QC</i>

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Registrations to be scanned/posted to Megan Llewellyn at:
megan@allsortedlifestyle.co.nz or 7 Rahiri Rd, Mt Eden, Auckland 1024

Venue: Regatta AD, The Pullman Hotel, Corner Princes Street & Waterloo Quadrant, Auckland City 1143

Title: _____ First Name: _____

Surname: _____

Designation: _____

Preferred Name on Badge: _____

Firm: _____

Position: _____

Department: _____

Postal Address: _____

Tel No: _____

Fax No: _____

Email: _____

Access/Dietary Requirements: _____

PLEASE NOTE: We may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event

Registration Fee

Please tick corresponding box.

Members \$1,000 + GST

STEP Membership number _____

CAANZ (TSIG) & ETPC members \$1,100 + GST

Non-Members \$1,200 + GST

Please tick box to receive information about becoming a member of STEP

Accommodation

There are a number of hotels close to the venue. A few that we would recommend include:

The Pullman Auckland

The Skycity Grand Auckland

The Crowne Plaza Auckland

We advise early booking as these hotels fill up quickly.

How did you hear about the conference:

STEP New Zealand Branch Other (please specify) _____

STEP Website _____

Social functions:

Please note the following social functions are included in the delegate rate.
Please specify if you wish to attend:

Thursday, 21st June Conference Drinks, The Northern Club,
19 Princes Street, Auckland 1010

Thursday, 21st June Conference Dinner, 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

Cheque

All cheques should be made out to "STEP CONFERENCES LIMITED",
denominated in New Zealand dollars and posted with registration
form to:

Megan Llewellyn

7 Rahiri Rd,

Mt Eden,

Auckland 1024

New Zealand

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

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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.