CHAIR



Vicki Ammundsen, Vicki Ammundsen Trust Law, Auckland

Vicki is a trust practitioner. She has an appreciation of the issues that confront older clients in the context of and interaction between estate planning, residential care subsidy concerns, relationship, family and trust related issues.

SPEAKERS



Catherine Atchinson, Martelli McKegg, Auckland

Catherine has wide experience in wills, trusts and estates, as well as an increasing elder law practice. She is an executive member of STEP and has presented papers for NZLS CLE on trusts, estates and elder law issues.



Kathryn Dalziel, Taylor Shaw, Christchurch

Kathryn is a partner specialising in employment and privacy law as well as civil litigation and professional ethics. She also lectures in Legal Ethics at the University of Canterbury and is on a NZ Law Society Standards Committee. Kathryn regularly presents at conferences and seminars in privacy, employment and legal ethics. She has co-authored "*Ethics, Professional Responsibility and the Lawyer*" (3rd Ed), and co-authored the chapters on *Employment Law and Health Information in Health Care and the Law (5th ed)*.



Professor Kate Diesfeld, Auckland University of Technology, Auckland

Kate is a member of the State Bar of California. She represented people with disabilities in Los Angeles and in England. Kate supervised the Kent Law Clinic (Mental Health and Learning Disability) in England. She was the Director of the National Centre of Health Law and Ethics at AUT and the Associate Dean of Research at the University of Waikato's Faculty of Law. She co-edited *Involuntary Detention and Therapeutic Jurisprudence (2003) and Elder Law in New Zealand* (2013). She Chairs AUT's Ethics Committee and is a member of Waikato DHB's Clinical Ethics Advisory Committee.

SPEAKERS



Dr Mark Fisher, Counties Manukau Health, Auckland

Dr Mark Fisher is currently Clinical Head and Consultant Psychiatrist in Mental Health Services for Older People in Counties Manukau Health, South Auckland. He is also the Director of Area Mental Health Services (DAMHS) for Counties Manukau under the Mental Health Act. Dr Fisher has been a practising psychiatrist for 20 years, and has worked in Old Age Psychiatry, Liaison Psychiatry and ECT services. He has spent many years in Leadership roles within Mental Health. He has worked primarily in New Zealand but also in the United Kingdom. His research interests are in dementia services, Mental Health law and Driving and Dementia. He has been keenly involved in the setting up of new dementia services in South Auckland.



Lee Harris TEP, Foley Hughes, Auckland

Lee completed the STEP Diploma in International Trust Management in 2012, which focuses on the legal, accounting and investment management aspects of cross-border structures involving trusts, companies and foundations. As a French speaker, she works extensively with clients and advisors in civil law jurisdictions. Her key strengths are in the areas of trusts, property, tax, wealth management and estate planning, with a particular passion for resolving conflict of laws challenges that arise from cross-border interests.



Mary Joy Simpson, Hesketh Henry, Auckland

A specialist in trust and estate planning law, Mary Joy regularly reviews and provides advice on personal asset management plans. She is experienced in navigating issues arising for clients and families as they put in place, and act under, enduring powers of attorney. Mary Joy has previously presented for NZLS CLE on trust drafting and ADLSi on enduring powers of attorney.



Ingrid Taylor, Taylor Shaw, Christchurch

Ingrid is a partner at Taylor Shaw. She has significant experience in property and business acquisitions, asset protection structures, and succession planning for private individuals and businesses. Ingrid is a member of the Trusts and Wills subcommittee of the NZLS, a member of the Institute of Directors and currently sits as a director on a variety of Boards.



Neil Williamson, Ministry of Social Development, Wellington

Neil is currently Principal Legislative Counsel at the Ministry of Social Development. He has been responsible for advising policy staff in relation to policy and legislation matters, and issuing drafting instructions for and assisting in the passage of numerous Acts and regulations, including the Protection of Personal and Property Rights Amendment Act 2007.

CONTENTS

In session order

Capacity	
Capacity	1
Prof Kate Diesfeld and Dr Mark Fisher	
Multigenerational Living – Going Further	
Multigenerational Living – Going Further	
Catherine Atchison	
Cross-Border Issues with International Estate Planning	
Cross-Border Issues with International Estate Planning	45
Lee Harris	
PPPR Act – New Legislation & EPA Forms	
New Legislation & EPA Forms	53
Mary Joy Simpson and Neil Williamson	
Professional Duties in Respect of Enduring Powers of Attorney: Probler and Precautions	ns, Solutions
Professional Duties in Respect of Enduring Powers of Attorney: Problems, Precautions	
Treaditions	
Kathryn Dalziel	
Kathryn Dalziel	
Kathryn Dalziel The Trustee Who Left it Too Late	
<i>Kathryn Dalziel</i> The Trustee Who Left it Too Late The Trustee Who Left it Too Late	
Kathryn Dalziel The Trustee Who Left it Too Late The Trustee Who Left it Too Late Ingrid Taylor	83

CONTENTS

Alphabetical by author/presenter

Author		Title	Page
Ammundsen	Vicki	Family Protection Act	91
Atchison	Catherine	Multigenerational Living – Going Further	21
Dalziel	Kathryn	Professional Duties in Respect of Enduring Powers of Attorney: Problems, Solutions and Precautions	77
Diesfeld	Professor Kate	Capacity Joint paper with Dr Mark Fisher	1
Fisher	Mark	Capacity Joint paper with Professor Kate Diesfeld	1
Harris	Lee	Cross-Border Issues with International Estate Planning	45
Simpson	Mary Joy	PPPR Act – New Legislation & EPA Forms <i>Neil Williamson</i>	59
Taylor	Ingrid	The Trustee Who Left it Too Late	83
Williamson	Neil	PPPR Act – New Legislation & EPA Forms Joint paper with Mary Joy Simpson	53