

CHAIR



Fred Ward, Russell McVeagh, Auckland

Fred is an experienced tax specialist and has been a partner of Russell McVeagh since 1995. He advises on all aspects of New Zealand Tax Law, with particular interest in tax disputes, corporate restructuring and cross-border financing issues. Fred is a member of the New Zealand Law Society Tax Committee and is a regular presenter at NZLS CLE conferences. He has a pug.

KEYNOTE SPEAKER



Sir Robert McLeod, Barrister, Auckland

Sir Rob is a tax barrister and professional director. He spent most of his professional career as tax and managing partner in the Big 4 accounting firms. Throughout his career, Sir Rob has been a tax advisor to corporate and private clients.

Sir Rob was a member of the Valabh Committee on CGT (1989-1992), the McLeod Review 2001, the Victoria University Tax Working Group (2009), and the Capital Market Development Task Force (2009). He was also a member of the Jordan Tax Working Group in Australia (2012) which was set up to advise the Commonwealth Government on an appropriate company tax rate.

Sir Rob was also Chairman of the New Zealand Business Roundtable from 2002 to 2010.

Sir Rob is Ngāti Porou and was awarded a KNZM in the 2019 New Year's Honours for services to business and Māori. He is married to Joanne Hodge, retired tax partner from Bell Gully and a member of the Cullen Tax Review (2018).

SPEAKERS



Simon Akozu, MinterEllisonRuddWatts, Auckland

Simon is a tax specialist with extensive experience advising clients on the tax aspects of financing arrangements, M&A and property transactions. His clients include domestic and foreign corporates, funds, banks and high net worth individuals.



Nick Bland, Simpson Grierson, Auckland

Nick has vast charity and not-for-profit tax expertise, providing extensive advice on New Zealand tax concession issues, Charities Act registration matters and general tax issues affecting New Zealand and international organisations.

SPEAKERS



David Carrigan, Inland Revenue, Wellington

David has worked for Inland Revenue since 1996 and has been a Policy Director since 2013. He led the tax reform of savings that led to the PIE and FDR rules. David is currently the Policy Director responsible for Inland Revenue's policy work on Business Transformation and the taxation of the digital economy.



Vivian Cheng, Chapman Tripp, Wellington

Vivian is an experienced practitioner who advises on a wide range of New Zealand tax matters, with particular expertise in cross border taxation, investment and business structures, mergers and acquisitions and international information exchange.



Stewart Donaldson, Inland Revenue, Wellington

Stewart, a fellow Chartered Accountant, has been a Senior Policy Advisor at Inland Revenue since January 2016 and has been a board member of a number of charities and not-for-profits.



Helen Johnson, PwC Legal, Auckland

Helen has advised clients on a range of tax matters for over 15 years. Before joining PwC Legal, she worked at top tier law firms in New Zealand and London.



Graham Murray, Bell Gully, Auckland

Graham is a tax partner at Bell Gully. His areas of focus include corporate taxation, restructurings, M&A tax issues and the tax aspects of cross-border investment arrangements and financing.



Jai Nario, PwC Tax M&A, Auckland

Jai is a Director at PwC specialising in Tax M&A. Her experience includes working at international accounting firms and Chapman Tripp, advising on tax structuring, M&A, cross-border investments and tax disputes.

SPEAKERS



Jared Otto, Inland Revenue, Auckland

Jared has worked solely in indirect taxes for over 21 years. He spent 15 years in the private sector variously in practice at a Big 4 firm and as the Head of VAT for a large multinational. Jared joined Inland Revenue six years ago as Principal Advisor – GST.



Richard Owen, Inland Revenue, Wellington

Richard is an experienced Senior Manager at Inland Revenue. He has worked in a range of business lead, national leadership roles. Richard is currently Customer Segment Leader for Small & Medium Sized Businesses across New Zealand.



Campbell Pentney, Bell Gully, Auckland

Campbell is a senior associate in the Bell Gully tax team and specialises in indirect taxes such as GST and custom and excise duties.



Robyn Rakete, Inland Revenue, Auckland

Robyn, an experienced transfer pricing specialist, is responsible for negotiating mutual agreement procedures, providing advice within IR and is the New Zealand delegate on transfer pricing matters at OECD.



Sam Rowe, Inland Revenue, Wellington

Sam works in the International Policy team at Inland Revenue. He worked on the recent BEPS measures, including the permanent establishment anti-avoidance rule. Sam previously worked in the private sector.

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