

## CHAIR



### **Greg Kelly, Principal, Greg Kelly Law, Wellington**

Greg has 40 years' experience in the wills, trusts and estate area. He is a member of the New Zealand Law Society Property Law and Family Law Sections, of Society of Trust and Estate Practitioners, and chaired the NZLS CLE Trust Conferences in 2009, 2011, 2015, 2017 and 2019. Greg is a contributor to Butterworth's *Law of Trusts*, probate and administration author for *McGechan on Procedure*, co-author of *Garrow and Kelly's Law of Trusts and Trustees* (6th and 7th editions) and of *Dobbies' Probate and Administration Practice* (5th and 6th editions).

## KEYNOTE SPEAKERS



### **Professor Jessica Palmer, Pro-Vice-Chancellor, Humanities, University of Otago, Dunedin**

Professor Jessica Palmer is the Pro-Vice-Chancellor of the Division of Humanities (of which the Law Faculty is a part) at the University of Otago. She also teaches and researches in contract, trusts and commercial law. Before joining the Otago Law Faculty in 2005, Jessica served as a Judges' Clerk in the High Court in Auckland and worked in a national commercial law firm.



### **The Honourable Justice Sir Joe Williams, Supreme Court Wellington**

Justice Williams has an LLB from the Victoria University of Wellington and an LLM (Hons) from the University of British Columbia. He became a partner at Kensington Swan in 1992 and went on to co-found Walters Williams & Co in 1994. In 1999 he became Chief Judge of the Māori Land Court and was appointed Deputy Chairperson of the Waitangi Tribunal shortly after in 2000. He was made Chairperson of the Waitangi Tribunal in 2004. Justice Williams was appointed a judge of the High Court in September 2008, a judge of the Court of Appeal in February 2018, and a judge of the Supreme Court in May 2019.

Justice Williams' iwi are Ngati Pūkenga, Waitaha and Tapuika.

## SPEAKERS



### **Dr Andrew Butler, Thorndon Chambers, Wellington**

Andrew is a seasoned advocate with extensive experience before New Zealand's superior courts. His practice focuses on commercial, trusts and public law. Andrew is co-author of the leading textbook on the New Zealand Bill of Rights Act 1990 and is the general editor of Thomson Reuters' *Equity and Trusts in New Zealand* (2nd edition).



### **Natalie Coates, Kāhui Legal, Rotorua**

Natalie is a Tumuaki | Partner at Kāhui Legal. Prior to joining the firm, she was a lecturer and taught papers on the Treaty of Waitangi, jurisprudence, tikanga and the law, legal ethics and law and society at the University of Auckland, Faculty of Law.



### **Isaac Hikaka, Partner, LeeSalmonLong, Auckland**

Isaac has particular expertise in complex relationship property and international trust disputes. He appears in cases in New Zealand and the Pacific Islands, including as lead counsel before the Privy Council.



### **Jeremy Johnson, Bankside Chambers, Auckland**

Jeremy is an experienced litigator and dispute resolution specialist with expertise in commercial, insolvency, relationship property, arbitrations, equity and trust law. He is a STEP member and holds a STEP Advanced Certificate in Trust Disputes, and a Fellow of the Arbitrators' and Mediators' Institute of New Zealand.



### **Chris Kelly, Greg Kelly Law, Wellington**

Chris has over 40 years' experience specialising in trusts. He is co-author of the new 8th and previous editions of *Garrow & Kelly Law of Trusts*.

## SPEAKERS



### **Jeff Kenny, Partner, Saunders Robinson Brown, Christchurch**

Jeff has over 30 years' experience in trust law. He is a member of STEP and contributing author of *New Zealand Conveyancing Law and Practice* published by CCH New Zealand and a contributing author of *Equity and Trusts in New Zealand* published by Thomson Reuters. He has also been involved in a number of committees dealing with the reform of New Zealand trust law.



### **Kimberly Lawrence, Greg Kelly Law, Wellington**

Kimberly provides strategic advice to clients dealing with difficult trust and estate problems, and acts in relation to trust and estate litigation of all kinds.



### **Colette Mackenzie, Greg Kelly Law, Wellington**

Colette has extensive experience in all aspects of trust law, advising clients on the use of trusts and wills in the context of asset planning, with particular expertise in dealing with attacks on the division of trust property.



### **Juliet Moses, Partner, TGT Legal, Auckland**

Juliet specialises in trusts, personal asset planning and succession. She is Chair of the STEP Education Committee and a contributing author and tutor of the Trusts and Estates Diploma (NZ).



### **Tim Mullins, Partner, LeeSalmonLong, Auckland**

Tim primarily practices civil litigation, and regulatory law and intellectual property. He regularly advises on legal professional/regulatory matters and lectured Legal Ethics for several years.

## SPEAKERS



### **Jared Ormsby, Plymouth Chambers, Christchurch**

Jared specialises in trusts and commercial litigation. He advised the Minister of Justice on the Trust Reference Group, is a STEP member and a contributing author to Thomson Reuters' *Equity and Trusts in New Zealand*.



### **Bill Patterson, Patterson Hopkins, Auckland**

Bill has an extensive trust, commercial and equity litigation practice. He is the author of *The Law of Family Protection and Testamentary Promises*, Nexis Lexis, now in its 5th edition.



### **Emerita Professor, Nicola Peart, University of Otago, Dunedin**

Nicola is a retired professor of law at the University of Otago, still doing research on trusts, relationship property and succession law. She was a member of the Law Commission's Expert Advisory Group on their reviews of trust law, relationship (property) law and now succession law.



### **Rebecca Rose, Bankside Chambers, Auckland**

Rebecca specialises in general civil, corporate/commercial and public law. Her practice spans a broad field of areas, including wills, trusts, and property. Rebecca has acted as counsel in all of New Zealand's higher courts and in numerous leading cases.



### **James Scullin, Trust Adviser, Todd Family Office, Wellington**

James joined the Todd Family Office in 2014. He specialises in trusts and estate planning.

## **SPEAKERS**



### **Tanya Speight, Senior Associate, Saunders Robinson Brown, Christchurch**

Tanya is a senior member of Saunders Robinson Brown's specialist trusts and estates team. She is a member of STEP and advises clients on all aspects of trust law, particularly complex trust and estate reviews and re-structures.



### **Stephen Tomlinson, Tomlinson Law, Christchurch**

Stephen advises clients (including law firms and accounting firms) on a wide range of taxation and trust law issues. He is a member of the NZLS Taxation Committee and the ADLS Trust Law Committee.



### **Andrew Watkins, Wynn Williams, Christchurch**

Andrew is a specialist in family law, particularly the resolution of complex relationship property and estate claims. He has conducted over 80 successful mediations and has completed courses in advanced negotiation and advanced mediation at Harvard.



### **Katrina Wood, Associate, Saunders Robinson Brown, Christchurch**

Katrina is a commercial and trust lawyer and works closely with Saunders Robinson Brown's trusts and estates team. Katrina is a member of the ADLS Documents and Precedents Committee and has been involved in redrafting standard form trust documents as a result of the Trusts Act. She advises clients on company and trust structuring.

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