

## CHAIR



### **Greg Kelly, Greg Kelly Trust Law, Wellington**

Greg has over 40 years' experience in the wills, trusts and estates areas. He is a member of the New Zealand Law Society Property Law and Family Law Sections and of the Society of Trust and Estate Practitioners. Greg has chaired the NZLS CLE Trusts Conferences in 2009, 2011, then consecutively since 2015, and delivered papers at numerous seminars and webinars. He is a principal author of the 8<sup>th</sup> edition of *Garrow and Kelly Law of Trusts and Trustees* and the 5<sup>th</sup> and 6<sup>th</sup> editions of *Dobbie's Probate and Administration Practice*.

## KEYNOTE SPEAKER



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

Bill has an extensive trust, commercial and equity litigation practice. He was a member of the reference group assisting the Law Commission in its review of the Law of Trusts and later assisting the Minister of Justice. Bill was also a member of the reference group assisting the Law Commission in its review of succession law. He is the author of the *Law of Family Protection and Testamentary Promises*, (Lexis Nexis now in its 5<sup>th</sup> edition) and author of the Laws of New Zealand titles *Wills and Administration of Estates*. Bill is also a contributing author to *Fisher on Matrimonial and Relationship Property and Wills and Succession* (Lexis Nexis). He is a member of STEP.

## SPEAKERS



### **Georgia Angus, Morris, Auckland**

Georgia is a partner at Morris and specialises in trust, estate and relationship property disputes. She has extensive experience representing professional trustees, charities and high net worth (HNW) individuals in contentious matters and has acted for clients in numerous offshore jurisdictions.



### **Henry Brandts-Giesen, Dentons Kensington Swan, Auckland**

Henry is a partner in the private wealth practice at Dentons Kensington Swan. His practice involves strategic wealth planning, managing fiduciary and legal risk involving private wealth, and resolving disputes relating to trusts, estates, and relationship property.



### **Andrew Butler KC, Thorndon Chambers, Wellington and Mills Lane Chambers, Auckland**

Andrew is a seasoned litigator, with extensive appellate, trial and alternative dispute resolution (ADR) experience. He is an acknowledged expert in commercial, trusts, and public law with much of his work having an international dimension. Andrew is a general editor of *Equity and Trusts in New Zealand*, the third edition of which will be published shortly.

## SPEAKERS



### **Shane Campbell, Wynn Williams, Christchurch**

Shane is a partner at Wynn Williams practising commercial and civil dispute resolution. He specialises in contentious equity, insolvency, and commercial litigation. Shane assists clients in all stages of dispute resolution, from advisory work to court, through all levels of appeal.



### **Te Aopare Dewes, Chapman Tripp, Auckland**

Te Aopare (Ngāti Porou and Ngāti Rangitihi) leads Te Waka Ture, Chapman Tripp's Māori legal group. Working closely with Māori land-owning entities, post-settlement governance entities and Māori businesses, she advises on a range of legal issues and has appeared before the Māori Land Court, in the Waitangi Tribunal and the Supreme Court.



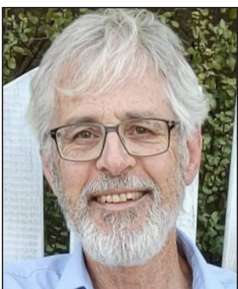
### **Hayden Griffiths, JBWere, Auckland**

Hayden's career as a financial market analyst spans more than two decades. As head of asset allocation, he is particularly passionate about working with enduring entities such as charities and iwi, to help them build values-aligned investment strategies that will deliver substantial future support to their underlying causes over the long term.



### **Isaac Hikaka, Mills Lane Chambers, Auckland**

Isaac (Ngāruahine, Ngāti Ruanui, Ngāti Maniapoto, Ngāti Tūwharetoa) has particular expertise in the interaction between trusts and other areas of the law. He appears in cases in New Zealand and the Pacific Islands, including as lead counsel before the Privy Council.



### **Chris Kelly, Trust Barrister, Wellington**

Chris is a barrister who provides trust advice and advises on drafting wills and trust documents. He has over 40 years' experience specialising in trusts and will drafting. Chris is co-author of the new 8<sup>th</sup> and previous editions of *Garrow & Kelly Law of Trusts* (LexusNexis, 2022) and recent editions of *Dobbie's Probate and Administration Practice*.

## SPEAKERS



### **Jeff Kenny, 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* (CCH New Zealand) and a contributing author of *Equity and Trusts in New Zealand* (Thomson Reuters). Jeff has also been involved in a number of committees dealing with the reform of New Zealand trust law.



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

Kimberly provides strategic advice to individuals, professionals, executors, and trustees involved with contentious trusts and estates, and acts in relation to all kinds of trust and estate litigation. She is a co-author of the 8<sup>th</sup> edition of *Garrow and Kelly Law of Trusts and Trustees* (LexisNexis, 2022).



### **Colette Mackenzie, Greg Kelly Trust 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. She is a co-author of the 8<sup>th</sup> edition of *Garrow and Kelly Law of Trusts and Trustees* (LexisNexis, 2022) and *New Zealand Guide to Trusts* (Thomson Reuters, 2023).



### **Janna McGuigan, Canterbury Chambers, Christchurch and Bankside Chambers (Associate Member), Auckland**

Janna is a specialist trusts and commercial litigator. She is a past president of the Auckland Women Lawyers' Association and a former member of the New Zealand Law Society's Law Reform Committee. Prior to joining the independent bar, Janna worked at Wilson Harle (Auckland), Russell McVeagh (Wellington), and as clerk to the Rt Hon Sir Andrew Tipping in the Supreme Court.



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

Juliet specialises in trusts and succession planning. She is a regular presenter of seminars in the area, including at the NZLS CLE Trusts Conferences. Juliet is Chair of the STEP Education Committee and a contributing author and tutor of the Trusts and Estates Diploma (NZ). She is also a member of the International Academy of Trust and Estate Law.

## SPEAKERS



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

Jared specialises in trusts and commercial litigation and has acted in some of New Zealand's leading trust and estate disputes. He advised the Minister of Justice on the Trust Reference Group prior to the passing of the Trusts Act 2019, is a STEP member and a contributing author to Thomson Reuters' *Equity and Trusts in New Zealand*.



### **Bethan Read, Morris, Auckland**

Bethan leads Morris' private client team and has extensive experience in creating and managing asset protection and succession planning structures. She specialises in trusts, wills and relationship property.



### **Royal Reed, Meredith Connell, Auckland**

Royal specialises in civil litigation involving international and Asian clientele. Her experience spans over 20 years, and her expertise includes cross-border/cultural litigation, relationship property, conflicts of law, and choice of forum issues.



### **Andrew Steele, Princes Chambers, Auckland**

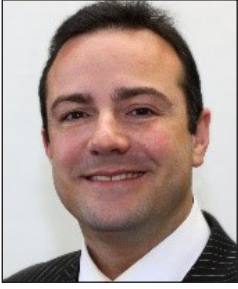
Andrew has over 30 years' experience in litigation and joined the independent bar as a barrister sole in 2020 specialising in trust and estate disputes. He regularly presents at seminars on a variety of property, trust and estate-related topics and has written a number of articles for the *New Zealand Law Journal*. Andrew is the lecturer for, and examiner of, the estate litigation component for the STEP diploma.



### **Judge Damian Stone, Māori Land Court, Wellington**

Judge Stone was appointed to the Māori Land Court on 25 March 2019. Based in Wellington, he is the resident Judge for the Tākitimu District (Hastings to Masterton) and he also sits in Levin. Judge Stone is also a member of the Waitangi Tribunal and is the current Presiding Officer for the Health Kaupapa Inquiry (Wai 2575).

## **SPEAKERS**



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

Stephen is the principal of Tomlinson Law. He has lectured in taxation, finance and business law at the University of Canterbury and is a well-known presenter of taxation and trust seminars and webinars. Stephen advises clients, including accounting firms and law firms, on a wide range of taxation and trust law issues. He is a member of the New Zealand Law Society's Tax Law Committee and the ADLS Trust Law Committee.



### **Emma Tonkin, Hesketh Henry, Auckland**

Emma is a partner in the private wealth team at Hesketh Henry. She specialises in private wealth, real estate and overseas investment. Emma works with individuals and families advising on trusts, estate planning and succession with a focus on real estate matters. She is a member of the ADLS Trust Law Committee.



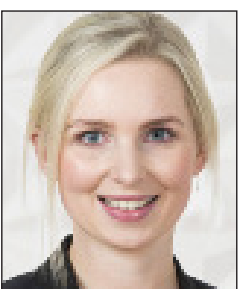
### **Lynell Tuffery Huria, Kāhui Legal, Wellington**

Lynell joined Kāhui Legal in August 2021. She was the first Māori patent attorney and is recognised as a leading expert on indigenous intellectual property rights. Since joining Kāhui Legal, Lynell has also explored the use of trusts as a framework for recognising custodianship and stewardship of indigenous intellectual property rights.



### **Israel Vaealiki, Jackson Russell Lawyers, Auckland**

Israel is a partner at Jackson Russell. He specialises in trusts, family succession planning and wealth preservation.



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

Katrina is a commercial and trust lawyer. She is a member of the ADLS Documents & Precedents and Trust Law Committees and has been involved in redrafting standard form trust documents as a result of the Trusts Act. Katrina advises clients on company and trust structuring.

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