

PRESENTERS



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.



Sally Morris, Morris, Auckland

Sally is the founding partner of Morris, a boutique litigation firm specialising in trust, estate and relationship property disputes. She regularly appears in all courts for HNW individuals, charities, executors, trustees and beneficiaries.

CONTENTS

1. INTRODUCTION.....	1
2. INTERPLAY BETWEEN RELATIONSHIP PROPERTY AND TRUSTS.....	3
<i>PRESTON V PRESTON [2021] NZSC 154.....</i>	<i>3</i>
<i>Facts.....</i>	<i>3</i>
<i>Decision.....</i>	<i>3</i>
<i>SUTTON V BELL [2023] NZSC 65.....</i>	<i>4</i>
<i>Facts.....</i>	<i>4</i>
<i>Decision.....</i>	<i>5</i>
<i>COOPER V PINNEY [2023] NZCA 62.....</i>	<i>6</i>
<i>Facts.....</i>	<i>6</i>
<i>Litigation history.....</i>	<i>6</i>
<i>Decision.....</i>	<i>7</i>
<i>Ongoing litigation</i>	<i>9</i>
3. SCOPE OF FIDUCIARY RELATIONSHIPS.....	11
FACTS	11
HIGH COURT.....	11
COURT OF APPEAL.....	12
SUPREME COURT	13
4. PROPER PURPOSE RULE.....	15
FACTS	15
HIGH COURT.....	16
COURT OF APPEAL.....	17
5. TRUSTEES' COSTS.....	19
RESOLVING AND AVOIDING TRUST DISPUTES	20
6. DIRECTIONS UNDER THE TRUSTS ACT 2019	21
7. APPLICATION FOR ALTERNATIVE DISPUTE RESOLUTION ORDERS	23
LEGISLATION	23
RECENT DECISIONS	24
PRACTICAL GUIDANCE	25
APPENDIX A.....	27