

PRESENTERS



Sally Morris, Partner, Morris Legal, Auckland

Sally is the founding partner of Morris Legal. She is admitted as a Barrister and Solicitor in New Zealand, New South Wales and New York and has a Master of Laws Degree from Columbia University in New York. Sally has an established reputation in the field of trust, estate and relationship property disputes, appearing regularly in the Family Court, High Court and Court of Appeal on behalf of trustees, beneficiaries, executors, charities and private clients.



Bethan Read, Special Counsel, Morris Legal, Auckland

Bethan is special counsel at Morris Legal and leads the firm's advisory team. She is qualified in both New Zealand and England and Wales and specialises in non-contentious private client advisory services. Bethan has extensive experience in creating bespoke estate planning and asset protection solutions including trust structures, wills, enduring powers of attorney, relationship agreements and all other private client services.

CONTENTS

ESTATE PLANNING FOR ELDERLY AND VULNERABLE CLIENTS	1
INTRODUCTION	1
ADVISING ON THE PREPARATION OF WILLS	1
RED FLAGS WHEN PREPARING WILLS.....	3
RISK MITIGATION	5
THE USE OF TRUSTS FOR ELDERLY CLIENTS.....	6
PROBLEMS THAT CAN ARISE THROUGH THE USE OF TRUSTS	8
RISK MITIGATION	9
THE CONSEQUENCES OF GETTING THINGS WRONG	10
POWERPOINTS.....	13