CHAIR



Carol Newton, NZILE President, Auckland

Carol Newton is a fellow of the New Zealand Institute of Legal Executives and has been on the National Council since 1989. Vice President 2001 to 2005 and President 2005 to the present time. Carol started the Institute's newsletter Envoy and has been actively involved in the branding of registered legal executive.

Carol is a registered legal executive and has worked at Chapman Tripp Sheffield Young for over 20 years. Carol practises in trust, asset planning and estates.

SPEAKERS



Christine Grice, Harkness Henry, Hamilton

Christine has practised for many years in the areas of commercial, corporate and insolvency dispute resolution. She regularly acts as mediator in disputes and negotiations throughout New Zealand.

Christine holds various board memberships and directorships as well as chairing the Perry Group, a diversified closely-held group of companies with interests including quarries, landfills, property developments and entertainment.

Christine is retained by the Institute of Directors to provide training nationally in small to medium enterprises ("SMEs") and special projects.



Alistaire Hall, Barrister and Solicitor, Manukau City

Alistaire has practised for 35 years and is currently a sole practitioner based in Manukau. He is a member of the NZLS Family Law Section, chair of Age Concern Counties Manukau, and a member of the Presbyterian Support Northern Board.



Deborah Hollings, Barrister, Auckland

Deborah specialises in domestic property disputes and structures. Her practice particularly includes more complex cases, often including company and family trust interests. She has appeared as counsel in numerous reported decisions in this area, including as leading counsel for the wife in Z v Z. Deborah is the author of *For Richer or Poorer* (CCH 2001) the best-selling handbook on domestic property and estate law, and has written numerous articles on these issues. She has presented seminars for the NZLS, the ADLS and other organisations and has delivered papers at numerous conferences.



Tim Jones, Glaister Ennor, Auckland

The focus of Tim's practice is residential and commercial property work. He also has considerable experience in land transactions and building developments. Tim is a member of the Auckland District Law Society Forms Committee, convener of the NZLS / PLS Land Titles Committee on the Landonline LINZ project, and was formerly a member of both the Auckland District Law Society Property & Business Law Committee and the NZLS Continuing Legal Education Board.



Chris Kelly, General Counsel PCS, New Zealand Guardian Trust, Wellington

Chris has nearly 30 years' legal experience as an estates and trust lawyer, including a number of years as a family trusts specialist. As the senior legal counsel at Guardian Trust, he is now responsible for developing in-house legal services. Chris has contributed to several legal texts, including two of the titles in *New Zealand Forms and Precedents* and is co-author of the recently published 6th edition of Garrow and Kelly *Law of Trusts and Trustees*.

Bruce Patterson, Duncan Cotterill, Auckland

Bruce established the Auckland office of Duncan Cotterill in 1987 and is a past chairman. He has a background in general commercial law with specialities in information technology, taxation and commercial property. He is a past presenter of NZLS and ADLS seminars in business, property and company law.



Sarah Simmers, Anderson Lloyd Caudwell, Dunedin

Sarah practices in the areas of corporate and commercial law with a particular focus on consumer credit law, commercial transactions and competition law. She has published articles and presented seminars on a number of banking law issues, and presents guest lectures for the University of Otago's Banking Law students. Sarah writes the "Credit and Finance" and "Bills of Exchange" chapters of LexisNexis' legal publication *New Zealand Forms and Precedents*.



Duncan Terris, Solicitor, Christchurch

Duncan specialises in conveyancing. He has been in practice for 17 years, including three years in Sydney. Most recently, Duncan was appointed as the NZLS e-dealing Consultant. He was involved as the representative for the legal profession on Land Information New Zealand's automation programme, "Landonline" and served as a member of the NZLS Land Titles Committee for five years.



Mark Lister, ABN AMRO Craigs, Tauranga

Mark Lister joined ABN AMRO Craigs in 2003 as a research analyst specialising primarily in property sector and small company research. In addition to covering the listed property sector, Marks coverage also extends to the agriculture sector, electricity, and a range of smaller companies, as well as broader investment strategy. As recognition of his success in these areas of expertise, Mark was awarded the title of top property analyst in New Zealand at the recent 2006 INFINZ industry awards, held in April of this year.

Prior to working for ABN AMRO Craigs, Mark spent a number of year working for TrustPower, a listed electricity generator and retailer, holding roles as a wholesale market analyst, a database and process developer and a pricing analyst. Mark holds a Bachelor of Management Studies degree with a major in finance, and is an NZX Associate Advisor.

CONTENTS

In session order

Fact Scenario: Harry and Sally	1
Conflicts of interests for conveyancers	9
Bruce Patterson Appendix 1	201
Legal structures and financing	55
Sarah Simmers	
Trusts, estates and the PRA – asset protection	65
Deborah Hollings	
A balanced portfolio	81
Mark Lister	
Subdivisions – Harry and Sally go developing	89
Tim Jones	
Appendix 2	213
Appendix 3	217
Appendix 4	219 221
Appendix 5 Appendix 6	221
Appendix 7	225
What to do when the contract goes wrong	129
Christine Grice	
Appendix 8	227
E-dealing	161
Duncan Terris	
Appendix 9	229
Appendix 10	231
Appendix 11 Appendix 12	233
Аррепиіх 12	235

Senior moments	179
Alistaire Hall Appendix 13	237
Appendix 14	239
Death – the final complication	187
Chris Kelly	

TABLE OF CONTENTS

Alphabetical by author

Author		Title	Page
Grice	Christine	What to do when the contract goes wrong	129
		Appendix 8	227
Hall	Alistaire	Senior moments	179
		Appendix 13	237
		Appendix 14	239
Hollings	Deborah	Trusts, estates and the PRA – asset protection	65
Jones	Tim	Subdivisions – Harry and Sally go developing	89
		Appendix 2	213
		Appendix 3	217
		Appendix 4	219
		Appendix 5	221
		Appendix 6	223
		Appendix 7	225
Kelly	Chris	Death – The final complication	187
Lister	Mark	A balanced portfolio	81
Patterson	Bruce	Conflicts of interest for conveyancers	9
		Appendix 1	201
Simmers	Sarah	Legal structures and financing	55
Terris	Duncan	E-dealing	161
		Appendix 9	229
		Appendix 10	231
		Appendix 11	233
		Appendix 12	235