PRESENTERS



Vicki Ammundsen, Director, Vicki Ammundsen Trust Law, Auckland

Vicki is a trust practitioner. She has an appreciation of the issues that confront older clients in the context of and interaction between estate planning, residential care subsidy concerns, relationship, family and trust related issues.



Henry Brandts-Giesen, Partner, Dentons Kensington Swan, Auckland

Henry is the Head of Private Wealth at Dentons Kensington Swan. His advisory practice involves family office design, family business succession planning and governance, family trusts, foreign trusts, charitable trusts, residency by investment, estate planning, relationship property, superannuation trusts, private funds, energy trusts, employee share schemes, fiduciary risk management, captive insurance, FATCA/CRS, and AML/CFT. He is also frequently involved in applications to court and disputes concerning trusts, estates, and relationship property. Henry's private clients include family offices, athletes, performers, and captains of industry but for the most part he advises ordinary New Zealand families and their businesses. He is often retained by law firms, regulators, banks, accountants, financial service providers, and professional trustees.

The statements and conclusions contained in this presentation are those of the author(s) only and not those of the New Zealand Law Society. This presentation has been prepared for the purpose of a Continuing Legal Education course. It is not intended to be a comprehensive statement of the law or practice, and should not be relied upon as such. If advice on the law is required, it should be sought on a formal, professional basis.

CONTENTS

RETHINKING TRADITIONAL ASSET PLANNING IN NEW ZEALAND	1
RISKS TO PRIVATE WEALTH	1
Trusts	
APPLICATIONS FOR TRUSTS	
Asset planning in New Zealand	
Key events in recent decades have changed the asset planning landscape in New Z	-
OTHER COMPLIANCE OBLIGATIONS	-
Further law reform in New Zealand	
OTHER TYPES OF ASSET PLANNING TOOLS	
Conclusions	
POWERPOINTS	