

## CHAIR



### **Chris Kelly, Greg Kelly Law, Wellington**

Chris Kelly had a lengthy career with trustee organisations – holding positions such as District Public Trustee for Wellington and General Counsel at Guardian Trust – before moving to private practice. He is co-author of two leading legal texts: *Garrow & Kelly Law of Trusts and Trustees* (now in its 7th edition) and the 6th edition of *Dobbie's Probate and Administration*. In addition to other publications, Chris has presented numerous papers at legal conferences and has chaired Elder Law Conferences. He completed a Master of Laws with a thesis on Trustee Accountability and is a member of the Society of Trust and Estate Practitioners (STEP).

## SPEAKERS



### **Catherine Atchison, Martelli McKegg, Auckland**

Catherine is a partner in the Estates and Trust Administration department and has wide experience in wills, trusts and estate, as well as the increasing elder law practice arising from her private client base. She is an executive member of STEP and has presented papers for NZLS CLE and ADLS on trusts, estates and elder law issues.



### **David Boyle, GM Investor Education, Commission for Financial Capability, Auckland**

A member of the Commission for Financial Capability's Leadership team, David's focus is one of helping all generations prepare for their retirement years. With a focus on the 50 plus age group, his role has been established to help New Zealanders plan and transition from working income, to investment income and how best to get there. With over 32 years of experience in the financial services industry and a passion for financial capability he brings a wealth of experience to the Commission.



### **Kathryn Dalziel, Taylor Shaw, Christchurch**

Kathryn is a partner specialising in employment and privacy law as well as civil litigation and professional ethics. In her 25 year career, she has also worked as a senior Crown prosecutor as well as a lecturer in employment law, privacy and legal ethics at the University of Canterbury. Kathryn regularly presents seminars on behalf of the Office of the Privacy Commissioner, is the author of *Privacy in Schools* and co-authored the chapter on Health Information in *Health Care and the Law* (4th ed).

## **SPEAKERS**



### **Peter Eastgate, Cavell Leitch, Christchurch**

Peter has specialised in the areas of wills, estate and succession law, elder law, attorneyship, asset protection and all aspects of trust law (including charitable trusts) for over 35 years. He is a member of the Convenors Committee of the Trusts Special Interest Group (Canterbury) and a member of the NZLS (Canterbury-Westland branch) Trust Committee. He has presented at numerous law conferences for NZICA, LexisNexis, the NZLS CLE and Legalwise.



### **Gill Goodwin, Anthony Harper, Auckland**

Gill advises on corporate and commercial law, with an emphasis on securities law and finance. She has been involved in drafting reverse equity mortgage documents for use in the retirement industry. Gill advises large and medium sized businesses and has advised extensively on board compliance issues, including in the corporate and the not-for-profit sector. Her other interest is as a panel member Human Rights Review Tribunal. That tribunal hears appeals from the Human Rights Commission, the Privacy Commissioner and the Health and Disability Commissioner.



### **Lesley Grant, Gillespie Young Watson, Lower Hutt**

Lesley has broad experience having worked in law firms in London, Sydney and Wellington. She is a partner and leads her firm's ElderLaw team and has a special interest in all aspects of law affecting the elderly, including the PPPR Act.

**CONTENTS**

**In session order**

**The Changing Face of New Zealand**

Is Retirement Redundant? What We’re Doing Today for Tomorrow ..... 1  
*David Boyle*

**Meet the 3 Generations**

The Three Generations – multi-generational housing and the impact on  
New Zealand’s aging population ..... 11  
*Catherine Atchison*

**Enduring Powers of Attorney**

EPAs: Protecting Personal and Property Rights ..... 35  
*Lesley Grant and Chris Kelly*

**Reverse Mortgages**

Reverse Equity Lending ..... 55  
*Gill Goodwin*

**Public Trust**

Public Trust ..... 71  
*Jacqui Beilby and Rachel Heffernan*

**Privacy and Confidentiality**

Privacy and Confidentiality ..... 83  
*Kathryn Dalziel*

**Trusts – the ageing trustee**

The Ageing Trustee ..... 89  
*Peter Eastgate*

# CONTENTS

## Alphabetical by author/presenter

<b>Author</b>		<b>Title</b>	<b>Page</b>
<b>Atchison</b>	Catherine	Meet the 3 Generations	11
<b>Beilby</b>	Jacqui	Public Trust <i>Joint paper with Rachel Heffernan</i>	71
<b>Boyle</b>	David	The Changing Face of New Zealand	1
<b>Dalziel</b>	Kathryn	Privacy and Confidentiality	83
<b>Eastgate</b>	Peter	Trusts – the ageing trustee	89
<b>Goodwin</b>	Gill	Reverse Mortgages	55
<b>Grant</b>	Grant	Enduring Powers of Attorney <i>Joint paper with Chris Kelly</i>	35
<b>Heffernan</b>	Rachel	Public Trust <i>Joint paper with Jacqui Beilby</i>	71
<b>Kelly</b>	Chris	Enduring Powers of Attorney <i>Joint paper with Lesley Grant</i>	35