

PRESENTERS



Anna O'Callaghan, Taylor Shaw, Christchurch

Anna is a Private Client practitioner with an in-depth understanding of succession planning, asset protection and personal structuring. She advises on all trust matters, including the establishment, maintenance, and winding up of trusts, as well as regularly working with wills and estates. Anna has a particular interest in elder law issues and estate work, and approaches these matters with due empathy and sensitivity. She is a member of Christchurch's Elder Law Special Interest Group. Her practice also includes counsel on relationship property, residential property matters, personal financing, and related issues arising out of our complex Canterbury property environment.



James Pullar, Taylor Shaw, Christchurch

James is the head of the Civil Litigation and Employment, and Education Law practice. He acts for a wide variety of clients including local and national businesses, School Boards of Trustees, Independent Schools around New Zealand, and private individuals.

James regularly appears in the District Court and the High Court across a broad range of civil work, as well as in the Employment Relations Authority and the Employment Court.

In civil litigation, he has developed specialist expertise in insurance law, negligence, contractual disputes, as well as contentious trust and estate matters.

James is an active contributor to NZLS CLE programmes, and the annual Young Lawyers' Mooting Competition. He currently sits on both the NZLS (Canterbury-Westland) Employment Law Committee and Special Events Committee and is a previous convenor of the Junior Practitioners' Committee.

CONTENTS

1. INTRODUCTION.....	1
2. A POTPOURRI OF PITFALLS IN PRACTICE IN THE DRAFTING OF WILLS AND ADMINISTRATION OF ESTATES.....	3
TRUST DEEDS AND WILLS.....	3
INCORPORATING DOCUMENTS INTO A WILL.....	4
MUTUAL WILLS.....	5
OVERSEAS EXECUTORS.....	6
ONLY ONE EXECUTOR.....	7
LOCATING BENEFICIARIES.....	7
CONCERNS ABOUT CAPACITY.....	9
CLERICAL ERRORS AND WITNESSING REQUIREMENTS.....	10
3. OTHER DEVELOPMENTS IN THE COURTS.....	13
TRUST BUSTING.....	13
QUANTIFICATION OF AWARDS.....	14
THE RELEVANCE OF TIKANGA TO ESTATE ADMINISTRATION.....	15
4. VALIDATION OF WILLS.....	17