

STEP NEW ZEALAND MINI CONFERENCE 2019

BEING A TRUSTEE IN TODAY'S CLIMATE: THE TAX, THE RISKS, THE DANGERS



This mini conference addresses how trustees and advisors navigate the 21st century complexities of dealing with the resentments and needs of beneficiaries; the ever changing tax and regulatory environment, whilst juggling the roles and responsibilities within a trust structure.

Conference program

12:30pm	Registration opens
1:00 – 1:05pm	STEP Welcome and Introduction – <i>Alison Gilbert, STEP NZL Chair</i>
1:05 – 2:00pm	Trustee costs & Trustees rights of indemnities; including Beddoes applications <i>Greg Kelly, Partner, Greg Kelly Law</i>
2:00 – 2:55pm	Trust Resettlements – Tax Implications <i>Stephen Tomlinson, Principal, Tomlinson Law</i>
2:55 – 3:20pm	Afternoon Tea
3:20 – 4:15pm	Beware Unhappy Beneficiaries <i>Suzanne Robertson QC, Bankside Chambers</i>
4:15 – 5:10pm	Who am I acting for? – Advising parties on contentious trust matters or where conflicts may exist <i>Jared Ormsby, Barrister, Plymouth Chambers</i>
5:10 – 5:15pm	Trust Bill Update – <i>Greg Kelly, Partner, Greg Kelly Law</i>
5:15 – 5:20pm	Close – <i>Alison Gilbert, STEP NZL Chair</i>
5:20 – 6:00pm	Drinks and canapés
6:00pm – Late	Dinner (<i>at additional cost</i>)

Date:

From 1:00pm
Wednesday
9 October 2019

Location:

Wintergarden Room,
The Northern Club,
19 Princes Street,
Auckland

Dinner:

Dinner and drinks to
follow from 5.30pm

Audio link for out-of-town attendees

Can't make it to the conference? Now you can hear the speaker's presentations and view their slides live via audio web link. Simply register and you will be emailed a link.

Register on-line at www.stepnz.org/registration or using the form on the back of this flyer

STEP NEW ZEALAND MINI CONFERENCE 2019

Registrations to be scanned/posted to Megan Llewellyn at:
megan@allsortedlifestyle.co.nz or 7 Rahiri Rd, Mt Eden, Auckland 1024

Venue: The Northern Club 19 Princes Street, Auckland, NZL

Title: _____ First Name: _____

Surname: _____

Designation: _____

Preferred Name on Badge: _____

Firm: _____

Position: _____

Department: _____

Postal Address: _____

Tel No: _____

Fax No: _____

Email: _____

Access/Dietary Requirements: _____

PLEASE NOTE: We may not be able to cater for any access/dietary requirements that are not made known to us at least 10 working days prior to the event.

Conference Registration Fee

Please note: dinner post conference will be an additional cost of \$90pp, select the rate including dinner if you wish to attend.

STEP Member Rate only \$NZ 220.00 +GST

STEP Member Rate including dinner \$NZ 310.00 +GST

STEP Membership number _____

Non Member Rate only \$NZ 300.00 +GST

Non Member Rate including dinner \$NZ 390.00 +GST

Please tick box to receive information about becoming a member of STEP

WEB STREAMING REGISTRATION FEE

Live weblink to presenter's audio and slides.

Link sent after registration. This link is for paid attendees only, and not to be distributed.

NOTE: Only available to attendees who are not in Auckland

Member Rate \$NZ 205.00 +GST

Non Member Rate \$NZ 285.00 +GST

Payments – please tick option

Electronic Transfer

If paying by bank transfer please ensure all charges are covered and your invoice is quoted.

Payment to: Kiwibank

Account name: STEP CONFERENCES LIMITED

Account details: 38-9011-0852568-00

Swift code: KIWINZ22

Reference details: Surname of attendee

Cheque

All cheques should be made out to
"STEP CONFERENCES LIMITED"
denominated in New Zealand dollars and posted
with registration form to:

Megan Llewellyn
7 Rahiri Rd,
Mt Eden,
Auckland 1024

All payment and registration queries:
email megan@allsortedlifestyle.co.nz
or phone Megan at +64 21 189 5546.

Terms and Conditions

Conference documentation will be distributed at the event. STEP reserves the right to amend or cancel this conference where the occasion necessitates. In the event of cancellation a full refund of any registration fee will be made but STEP shall accept no further liability. Prices may be subject to change. This booking form constitutes a legally binding contract. The delegate and firm are jointly and severally liable for payment of the fees due. The conference language is English.

Data Protection

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ABOUT STEP

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Today we have over 20,000 Members across 95 countries. They include lawyers, accountants and other trust and estate specialists. Find out more at www.step.org