



Estate Planning Conference 2025

**Navigate the Evolving Landscape
of Estate Planning**

Conference Programme for Thursday, 7 August 2025

**The *Law*
Association**
OF NEW ZEALAND

Time:

In Person: *Conference* 12:30 PM – 5:00 PM

Networking 5:00 PM – 6:00 PM

Livestream: *Conference* 12.30 PM–5.00 PM

CPD Hours: 4

Venue: TLANZ, Level 18, 48 Shortland
Street, Vero Centre, Auckland
(Shortland and Chancery Rooms)

Join us at the **Estate Planning** **Conference 2025**

Estate planning is no longer straightforward – and when things go wrong, the legal, financial, and personal consequences can be far-reaching.

TLANZ Estate Planning Conference 2025 Planning for Complexity – Risks, Challenges & Practical Solutions brings together legal experts and industry professionals to unpack the changing dynamics of estate and succession planning.

Tailored for trusts and estates lawyers, private client advisors, and practitioners working in family and elder law, this conference examines the latest developments impacting the field – from capacity assessments and trust law changes to international estate structures and digital assets.

Gain practical guidance on managing increasingly complex client needs, mitigating risk, and adapting your approach in the face of shifting legal, societal, and family dynamics.

Whether you're advising on high-value estates or supporting vulnerable clients, this is your opportunity to stay informed and equipped for what's ahead.

Secure your spot today!

Networking Opportunities

Build valuable connections at the Estate Planning Conference 2025. Engage with peers and industry experts during the networking break and post-event refreshments.

Expand your professional network, exchange insights and connect with like-minded professionals in a relaxed and engaging setting.

Don't miss this chance to grow your connections!



Estate Planning Conference *Tickets*

Thursday, 7 August 2025

12:30 PM – 5:00 PM (4 CPD Hours)

TLANZ, Level 18, Vero Centre, 48 Shortland Street, Auckland

Livestreamed and In Person
Limited in-person spaces available.

	Member	Non-member
Early Bird Pricing (30% Discount)	\$385 ^{+GST}	\$545 ^{+GST}
Full pricing for Half-day Conference	\$550 ^{+GST}	\$775 ^{+GST}
Early bird pricing ends Monday 14 July 2025		



Register for
Auckland In Person



Register for
the Livestream

Group bookings available by emailing
cpd@thelawassociation.nz

The Programme

Time	Mins	Session	Presenters
12:00 PM	30	Registration and Coffee	
12:30 PM	5	Opening by Chair	Rebecca Steens, Associate, Holland Beckett
12:35 PM	45	The Alphabet Case – What are the Implications for Estate Planning? The Supreme Court's judgment in <i>A, B & C v D and E Ltd</i> – commonly referred to as the <i>Alphabet Case</i> – is notable for its fresh affirmation and advancement of the principles and indicia of fiduciary relationships in the family context, but it also contains gems for estate planners. Andrew will highlight the guidance that can be taken from the Judgment and discuss how the equitable principles in that case align with other the important Supreme Court Judgments in <i>Legler V Formannoj</i> and <i>Cooper v Pinney</i> – with a focus on guidance for estate planners.	Andrew Steele, Barrister, Princes Chambers <i>Lead Counsel for the respondents in A, B & C v D and E Ltd.</i>
1:20 PM	45	Estate Planning Without a Trust – Sensible or Sacrilege? The favoured NZ family trust may be losing some of its glow following the introduction of the high trust tax rate, increased compliance costs, litigious beneficiaries, and a review of succession law. How can lawyers advise their clients to structure their affairs and safeguard their assets from claims without a trust? This presentation will look at other ways of transferring property both during the testator's lifetime and under the terms of their will. Priscilla will address joint ownership, gifting (including conditional gifts), life interests and the protection afforded to an estate by a well drafted will. With reference to case law, Priscilla will highlight the issues and risks associated with the different options.	Priscilla Brown, Special Counsel, Russell McVeagh

The Programme (Cont'd)

Time	Mins	Session	Presenters
2.05 PM	45	Multi-Jurisdictional Estate Planning This session offers a practical overview of estate planning for clients with assets or beneficiaries across multiple jurisdictions, focusing on what legal practitioners need to flag early and plan for effectively. As more clients hold overseas property, investments, or connections, it's essential to identify potential risks such as conflicting succession laws, forced heirship regimes, and tax exposures (without stepping into tax advice). Rebecca highlights key planning tools, common traps, and the importance of early coordination with foreign advisors. The goal is to help you ask the right questions, spot red flags, and ensure your client's wishes are carried out as smoothly as possible across borders.	Rebecca Steens , Associate, Holland Beckett
2.50 PM	30	Networking / Afternoon Tea Break	
3:20 PM	45	Asset Planning After Capacity Loss: What are the Options? What happens to asset planning when a client loses capacity midway through the process? Theresa and Henry explore practical strategies for adapting plans and moving forward, ensuring clients' interests are safeguarded despite unexpected changes.	Theresa Donnelly , Legal Services Manager, Perpetual Guardian Henry Stokes , Group General Counsel, Perpetual Guardian
4.05 PM	50	Panel Discussion: Pulling It All Together To close the conference, our expert presenters will come together for a dynamic panel discussion, drawing on the key themes and insights from the day. Using a practical case study, the panel will explore how the issues raised across each session intersect in real-life scenarios, offering a holistic view of modern estate planning challenges and strategies.	Chair: Rebecca Steens Priscilla Brown Theresa Donnelly Andrew Steele Henry Stokes
4:55 PM	5	Closing by Chair & TLANZ President	Rebecca Steens and Tony Herring
5:00 PM	60	Networking Refreshments & Canapés Take the opportunity to further build connections with other professionals in the legal field.	

Our *Presenters*



Chair of the Conference

Rebecca Steens

Associate, Holland Beckett

Rebecca leads Holland Beckett's Succession and Estate Administration Team. She advises on Wills, Enduring Powers of Attorney, Trust formation, administration and applications for variations, estate administration (including contentious estates), independent trusteeship/executorship and occupation right agreements. With a background in contentious trusts and estates, Rebecca brings a unique and practical perspective for her clients. Prior to joining Holland Beckett, she had 8 years of experience in estate, trust and general litigation, including four years at an Offshore firm in Jersey, in the Channel Islands.



Priscilla Brown

Special Counsel, Russell McVeagh

Priscilla is one of the leaders of Russell McVeagh's private client team. She specialises in the protection and enforcement of property interests in relation to estates, trusts and relationship property. Her work involves advising clients on establishing robust planning structures as well as litigation and dispute resolution. Priscilla is a member of the TLANZ Trust Law Committee and STEP. She has presented seminars for TLANZ and NZLS on issues related to her practice and has written articles for TLANZ and STEP.



Theresa Donnelly

Legal Services Manager, Perpetual Guardian

Theresa graduated from Auckland University in 1992 and has a wealth of experience in Elder Law and Trust-related matters. She was formerly from Public Trust (Senior Solicitor and Team Leader) and the Ministry of Social Development leading the Senior in the Public Law Team, working with Parliamentary Counsel, Older People's Policy and the Office of Senior Citizens. Theresa worked on the 2017 changes to the EPA forms. She is a regular presenter to professional groups such as TLANZ, NZLS, CCH, STEP, and Legalwise, and is known for her practical approach.

Our *Presenters*



Andrew Steele

Barrister, Princes Chambers

Andrew has over 35 years' experience in litigation in New Zealand and the United Kingdom. Previously a partner at Chamberlains, then a partner at Martelli McKegg Lawyers from 2006 to October 2020, he then left to join the independent bar as a barrister sole specialising in trust and estate disputes. He has been Convenor of ADLS' Civil Litigation Committee and is presently a member of TLANZ's Trust Law Committee. He has presented seminars for TLANZ, NZLS, STEP, Legalwise and CCH on a variety of property, trust and estate-related topics and has written a number of articles on trust-related topics for the New Zealand Law Journal and other publications. He is the lecturer for and examiner of the estate litigation component for the STEP diploma.



Henry Stokes

Group General Counsel, Perpetual Guardian

Henry was appointed General Counsel in 2019. He brings significant fiduciary expertise with considerable experience as in-house counsel in trustee companies and also time in private practice. Henry is an expert in the trusts and estates field and is a regular presenter for the legal profession's continuing legal education seminars, as well as media interviews for trust, estates and wills related matters. He has experience in all facets of the process from the preparation and implementation stages through to disputes, claims and proceedings, having appeared in the Family and High Courts as well as the Court of Appeal. Henry is responsible for Perpetual Guardian's Legal Team as well as being a significant contributor to their Senior Leadership Team and brings experience in leadership, team transformation and productivity and process improvement.



Lawyers by nature thrive on doing their best work. Our aim is to help them achieve excellence through the solutions, tools, skills and connections we deliver every day. And by bringing a voice, an identity, and a sense of belonging to our community, we support the collective advancement of legal practices and laws. We're right here enabling New Zealand's lawyers to take their work, their career, and our profession, to the next level.

**The *Law*
Association
OF NEW ZEALAND**

cpd@thelawassociation.nz 

thelawassociation.nz 