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Cradle to Grave®

Conference 2025

Navigating the Realities
of Technical Legal Issues

C2G

The Law Association
OF NEW ZEALAND

In Person

Thursday 15 May 8:15am – 6:45pm

7 CPD Hours

Pullman Hotel
Princes Ballroom
Corner Waterloo Quadrant
& Princes Street, Auckland CBD

Livestream

Thursday 15 May 8:45am – 5:15pm

7 CPD Hours

Online
Livestream link of the event
will be provided the day prior

C2G returns for 2025

Navigating the Realities of Technical Legal Issues

Our flagship conference for general legal practitioners and specialists in property, family, trusts, wills, and estate planning is back for another year.

Designed to maximise engagement, learning, and networking, C2G 2025 features an exceptional lineup of industry-leading speakers at the forefront of their profession.

Enhance your expertise, stay ahead of legal developments, and connect with peers.

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Cradle to Grave®
Tickets

EARLY BIRD (closes 15 April 2025)	**MEMBERS** **$616+GST**	**NON MEMBERS** **$868+GST**
FULL PRICE (from 16 April 2025)	**MEMBERS** **$880+GST**	**NON MEMBERS** **$1240+GST**

Early Bird pricing closes on Tuesday 15 April.
Up to 10% off group bookings – enquire now about group pricing.
CPD@thelawassociation.nz

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To book with the *Pullman Hotel*, email **reservations@pullmanauckland.co.nz** with the subject line **"C2G 25 Accommodation Request"**.

Build *Your Own* Conference

Select your own in-person sessions and hear from leading professionals about the issues relevant to you. Listen as our expert speakers give you a topline overview of their topics, then choose the ones you want to attend.

Programme

All Spotlight Sessions In Person	Livestream Only	In Person (IP) and Livestream (LS)

Time	Session	Speaker(s)
8.15am	**Registration and Coffee & Pastries**	
8.45am	**Opening by the Chair**	**Vicki Ammundsen**
8.50am	**Session A** **Property Law and Relationship Property Law: Working Together Across Disciplines** The disconnect between family law and property law can create critical issues when handling matters such as funding, asset division, and property transactions. Misaligned timing, overlooked details, and poor communication between these two disciplines often lead to errors that can negatively impact clients. This session offers practical insights into improving collaboration between family and property lawyers to bridge these gaps and ensure better outcomes for clients. This session includes discussion on the following points: • Aligning different workflows: Understanding the differing timelines of property contracts and relationship property agreements and how to coordinate them effectively. • Avoiding common pitfalls: Exploring real-world examples, such as property purchases made without relationship property agreements or gifting arrangements finalised without proper legal safeguards. • Interdisciplinary communication: Strategies for fostering better collaboration between family lawyers, property law practitioners and accountants to ensure all key issues are addressed before critical decisions are made. • Practical scenarios: Addressing situations like property settlements and funding for property purchases, and leveraging role clarity to prevent last-minute complications or lost client leverage. This session provides actionable insights for practitioners to create a holistic approach to property-related disputes in family law and to foster communication and coordination between disciplines, helping them deliver seamless and comprehensive service to their clients.	**Vicki Ammundsen** (Moderator) **Sam Bassett** **Helen Radinovich** **Emma Tonkin**
9.35am	**Session B** **EPOAs: Practical Realities and Common Pitfalls** Focused on practical advice and actionable insights, this session is designed to equip participants with the tools needed to manage Enduring Powers of Attorney (EPOAs) effectively and ensure these vital documents achieve their intended purpose. EPOAs are essential legal tools, but their practical application often presents challenges, misunderstandings, and even risks of misuse. This session moves beyond drafting and form completion to delve into the real-world issues faced by attorneys, families, and legal professionals when managing EPOAs. This session will explore: • When EPOAs come into effect: Addressing common confusions around activation, particularly in cases involving property attorneys and capacity assessments, and the legal risks of missteps. • Practical pitfalls: Examining real-world examples of poor advice, misuse of authority, and how to manage conflicts of interest while maintaining independence between donor and attorney. • EPOAs and trusteeships: Understanding how an attorney's powers intersect with trustee duties, especially when trust assets are involved. • Conflict resolution: Strategies for attorneys to effectively navigate challenging decisions and ethical dilemmas. • Revocation, suspension, and death - practical considerations - intersection of "what the donee wants" and the law.	**Vicki Ammundsen** **Theresa Donnelly**
10.20am	**Session C** **Problematic Probates: Practitioner and Registry Perspectives** The probate process does not always run smooth – there can be various questions about validity of a will, a range of errors with the probate application, and sometimes both. Drawing on their depth of experience and with reference to real-life examples, the presenters will highlight a range of issues, provide guidance on legal and procedural matters, and offer insights from practitioner and registry perspectives.	**Tony Mortimer** **Denise Robins**
11.05am	**Sponsorship**	
11.10am	**In-Person and Online Giveaways**	
11.15am	**Networking Break 1**	
11.45am	**Pre-recorded Video (Online viewers only)** **Personal Safety and Communication** **Speaker: Lance Burdett** Our world is changing and having an impact on many causing anger and aggression. Lance will cover what happens to make people feel angry and how to stay safe while communicating effectively in escalating situations. He will show how to de-escalate using verbal and non-verbal techniques. **In The Spotlight** The Spotlight session speakers will each give a brief rundown of their topic. It is a chance for in-person attendees to evaluate and choose which sessions they would like to attend.	**Lance Burdett**
12.05pm	**Spotlight Session 1A:** **Common Conveyancing Considerations: Avoiding Stumbling Blocks with Tax, Settlement and Other Issues** **Speakers: Stella Chan Riaan Geldenhuys** This interactive session will cover a range of matters arising in the conveyancing sphere, including recent changes to the Bright-line and rollover relief rules plus other tax considerations, common issues such as managing the compensation clause in the Agreement for Sale & Purchase and client expectations, and the delays in property settlements caused by source of wealth and client due diligence verification. A case study will be used to bring the material to life. **Spotlight Session 1B:** **To Be or Not to Be a Trustee: The Dos and Don'ts of Trust Administration** **Speaker: Tammy McLeod** This session will cover key practical aspects of trust practice management, including best practice trust administration and ensuring proper key trust record retention. It will highlight trustee responsibilities and offer practical guidance for lawyers to streamline trust administration and ensure compliance. **Spotlight Session 1C:** **Before the Cradle: Legal Issues Relating to Embryos and Gametes** **Speakers: Stewart Dalley, Jennifer Wademan** This session will explore the legal framework surrounding property rights for embryos and human gametes, focusing on how inheritance, trusts, and estate planning intersect with reproductive and family law. Key topics include surrogacy implications, citizenship, and blended family dynamics. Attendees will gain practical insights on mitigating legal risks, ensuring clarity in estate planning, and understanding international approaches to these evolving issues.	**Stella Chan** **Stewart Dalley** **Riaan Geldenhuys** **Tammy McLeod** **Jennifer Wademan**

Programme

All Spotlight Sessions In Person | Livestream Only | In Person and Livestream (Online)

Time	Session			Speaker(s)
12.55pm	**Spotlight Session 2A:** **Mutual Wills and Life Interest Wills – Common Drafting and Administration Issues** **Speakers: Kimberly Lawrence, Colette Mackenzie** This session will explore the complexities of mutual wills and life interest wills, focusing on common issues that arise in their drafting and administration. Attendees will learn how to identify potential problems, such as implications for title registrations, entitlements, relationship property, and estate claims, and how to find effective solutions. The session will emphasise the value lawyers bring to will drafting by asking the right questions, going beyond simply recording client instructions. Attendees will gain insights into how thoughtful, comprehensive advice can help clients avoid unintended consequences and protect their assets in the long term.	**Spotlight Session 2B** **Equity vs Pragmatism in Trust Disputes** **Speaker: Jeremy Johnson** This session explores balancing equity and pragmatism in trust disputes, focusing on s 145 of the Trusts Act 2019. It offers mediation strategies for resolving complex issues, including challenges with unspecified beneficiaries and minors, while addressing the financial burdens these complexities create.	**Spotlight Session 2C:** **Conscious Decoupling – Managing the Tensions between Trust Law and the PRA on Relationship Breakdown** **Speaker: Jennie Hawker, Simon Weil** This presentation will provide a practical focus on the interplay between contracting out agreements, trusts, Part 8 of the Property (Relationships) Act and wills, particularly in the context of relationship dissolution, separation, and death. Through real-life scenarios, we will explore the tensions between trust law and the PRA, the intersection of Section 21 Agreements with trusts, and the complications that arise when trustees are unaware, or not fully involved, in ratifying these agreements. A case study will illustrate the importance of ensuring all trustees are aligned, especially when asset division is tied to a memorandum of wishes. Attendees will gain practical insights into managing these complex interactions in family law, trust and property disputes, particularly when addressing issues of asset division, family home access, and legal risks following death or separation. This session will emphasise the need for comprehensive guidelines and careful drafting to ensure smooth and equitable outcomes for clients.	**Jennie Hawker** **Jeremy Johnson** **Kimberly Lawrence** **Colette Mackenzie** **Simon Weil**
1.40pm	**Networking Break 2**			
2.40pm	**Spotlight Session 1A (Repeated)** **Common Conveyancing Considerations: Avoiding Stumbling Blocks withTax, Settlement and Other Issues**	**Spotlight Session 1B (Repeated)** **To Be or Not to Be a Trustee: The Dos and Don'ts of Trust Administration** (LS & IP)	**Spotlight Session 1C (Repeated)** **Before the Cradle: Legal Issues Relating to Embryos and Gametes**	
3.30pm	**Spotlight Session 2A (Repeated)** **Mutual Wills and Life Interest Wills – Common Drafting and Administration Issues**	**Spotlight Session 2B (Repeated)** **Equity vs Pragmatism in Trust Disputes**	**Spotlight Session 2C (Repeated)** **Conscious Decoupling – Managing the Tensions between Trust Law and the PRA on Relationship Breakdown** (LS & IP)	
4.20pm	**Session D** **Certainty vs Justice: Some Recent Developments in Fiduciary Law** Anthony Grant and Andrew Steele with moderator Sandra Grant will discuss two subjects, relating to the Supreme Court decisions in: • *Legler v Formannoij:* can a person be both a sole director of a corporate trustee and a beneficiary?; and • the *Alphabet Case:* what are its practical implications?			**Sandra Grant** (Moderator) **Anthony Grant** **Andrew Steele**
5.05pm	**Sponsorship**			
5.10pm	**Closing by the President and the Chair**			**Tony Herring** **Vicki Ammundsen**
5.15pm	**Post-Conference Networking**			

Scan the QR Code to *instantly* join the Q&A on Slido, where you can start engaging before and during the conference.

The Speakers

Chair of the Conference

Vicki Ammundsen

Director and Notary Public, Vicki Ammundsen Trust Law Limited

Vicki is the director of Vicki Ammundsen Trust Law. In addition to providing trustee services Vicki advises on all areas of trust and estate law and practice including contentious trusts and estates. Vicki is the author of a number of texts including *Taxation of Trusts, Trustee Liability,* the *Trustee's Handbook*, *The Residential Care Subsidies Handbook* and *A Practical Guide to Legal Issues for Older People*. As well as being a highly regarded conference and webinar presenter, Vicki also maintains the blog *Matters of Trust*.

Sam Bassett

Director, Moore Markhams Chartered Accountants Auckland

Sam has worked in private practice accounting since 1993 and has been a partner since 2001. He specialises in assisting small to medium-sized legal firms with profit improvement strategies and succession planning. Sam provides valuation and litigation support, particularly in section 15 economic disparity calculations. He is regularly appointed by the Court or parties to a dispute as an independent trustee to assist with Trust management and reach resolution regarding the sale of trust assets.

Lance Burdett

Director, Consultant, Facilitator WARN International

Lance spent 22 years in the NZ Police, 13 as a crisis negotiator. He brings experience from training in New Zealand, Australia, England, and the USA with the elite units of police, prisons, emergency services, the military, and the FBI. Lance has a Master of Arts majoring in Terrorism, Safety & Security, a Diploma in Policing, a Diploma in Business Studies, and is completing a Diploma in Positive Psychology and Wellbeing. He is a published author of the bestselling books *Behind The Tape* and *Dark Side of the Brain*. His third book *Anxiety is a Worry* was released in August 2024. Lance also makes regular media appearances.

Stella Chan

Partner, Forest Harrison

Stella is a partner at Forest Harrison. Before co-founding the firm in 2006, she gained extensive experience working at several prominent law firms in Auckland. Stella specialises in property development and other property related transactions. She is a longstanding member of TLANZ's Property Law Committee and is an Accredited Property specialist with NZLS' Property Law Section. In addition, Stella has presented on commercial leases for NZLS and spoken on property purchases, property development, trusts and other legal topics to various private organisations within her community.

Stewart Dalley

Partner, Dalley Sundar

Stewart is an industry expert on the law relating to human infertility, assisted reproductive technology, and family creation. He frequently advises a broad range of clients and fertility clinics on embryo/egg/sperm donations, domestic and international surrogacy, and adoption. Stewart was an expert adviser to the Law Commission when reviewing New Zealand's surrogacy laws. He has three children with his male partner through surrogacy, and therefore has both real-life and professional experience when it comes to surrogacy. Stewart also has experience in representing clients at the Immigration and Protection Tribunal, Family Court, District Court and High Court. He is the former Chair of TLANZ's Immigration and Refugee Law Committee. Stewart is experienced in all aspects of immigration and refugee law, assisting clients with complex visa applications, deportations, humanitarian appeals, and refugee claims.

The Speakers

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. Theresa was formerly from Public Trust (Senior Solicitor and Team Leader) and the Ministry of Social Development where she was lead 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.

Riaan Geldenhuys
Barrister, Tax and Dispute Resolution Specialist

Riaan is a barrister and advises a number of high-profile companies, individuals, accounting and law firms on income tax, GST and Customs issues.
Before joining the bar, Riaan was a tax dispute specialist for PwC, and worked in senior roles in Inland Revenue. Prior to immigrating from South Africa, Riaan practised as a solicitor and was a litigation partner from 1999.

Anthony Grant
Barrister, Paladin Chambers

Anthony is an Auckland barrister who specialises in the laws concerning Trusts and Estates. He acts as counsel in Trusts and Estate litigation and gives advice on Trust structures and constructive ways to resolve disputes involving Trusts and Estates. He is a regular contributor to *LawNews* on new developments involving Trusts and Estates and delivers papers at legal conferences on these topics.

Sandra Grant
Barrister, Paladin Chambers

Sandra is a senior commercial and civil barrister, with over 30 years' experience in litigation. She is a member of Paladin Chambers, practising from Auckland and Queenstown. She appears in all the senior courts on a regular basis. Her specialties include trusts, estates, relationship property, business, and land litigation.

Jennie Hawker
Director, Haigh Lyon Lawyers

Jennie, a director at Haigh Lyon Lawyers, co-leads the firm's vibrant and effective family law team. Certified Fellow of the International Academy of Family Lawyers, she's recognised by Doyle's Guide as a foremost expert in New Zealand on relationship property and family law. Jennie has 20 years' experience in family law and is a contributing author to Westlaw's family property and family procedure chapters.

Jeremy Johnson
Barrister, Arbitrator, Bankside Chambers

A leading barrister, Jeremy is an experienced trial, arbitration and appellate advocate with expertise in commercial, shareholder, insolvency, relationship property, equity and trust law. Jeremy is a member of the Society of Trust and Estate Practitioners (STEP), a Fellow of the Arbitrators' and Mediators' Institute of New Zealand (AMINZ), a Fellow of the International Academy of Family Lawyers (IAFL), and a member of the International Trust Arbitration Organisation Advisory Board (ITAO).

The Speakers

Kimberly Lawrence
Director, Greg Kelly Trust Law

Kimberly specialises in complex estate and trust matters, with a focus on providing technical legal opinions, strategic advice, and minimising risks for executors and trustees who are involved in disputes or in litigation.

Colette Mackenzie
Director, Greg Kelly Trust Law

Colette has extensive experience in all aspects of estate planning, including trusts, estates, relationship property, wills and EPAs. Alongside strategic asset planning advice, she specialises in designing bespoke structuring arrangements to meet client needs and minimise future disputes.

Tammy McLeod
Managing Director, Davenports Law

Tammy is the Managing Director at Davenports Law. She is a trust and asset structuring specialist with over 25 years' legal experience specialising in the areas of personal asset planning, trust law and the Property (Relationships) Act.

Tony Mortimer
Registrar, Auckland High Court Techncial Unit

Tony has worked in courts for many years in various roles and as technical registrar at the High Court, Auckland, from 2000. As registrar and sheriff, Tony leads a team of 4. He and his team exercise delegated powers of the High Court to consider common form applications for grants of administration.

Helen Radinovich
Barrister

Helen practises in all areas of family law, including relationship property, trust and estate claims, spousal maintenance, care of children and family violence. She has been on TLANZ's Family Law Committee since 2018 and the NZLS' Family Law Section Advisory Panel since 2019. She regularly presents seminars on family law topics. Helen is a legal aid provider.

The Speakers

Denise Robins

Principal and Director, Robins & Co

Having worked in law for close to 40 years, Denise is an acknowledged authority on, and has an in-depth knowledge of, the area of deceased estates. Prior to forming her company Robins & Co in 2005, she held a number of positions, the last being Senior Estates Manager for a High Street law firm. Through her business, she is engaged by many practitioners around New Zealand as a drafting specialist, drafting in their name all manner of High Court documents to obtain Probate, Letters of Administration et al. As well as offering general estate guidance for practitioners, she was the go-to commentator on Radio Live covering estates and will matters that made their way through our courts system.

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 NZLS, ADLS, 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 *LawNews* and other publications. He is the lecturer for and examiner of the estate litigation component for the STEP diploma.

Emma Tonkin

Partner, Hesketh Henry

Emma is an experienced commercial property lawyer who advises clients on a broad range of property issues. Her clients include landlords and tenants, private developers, landowners in the sporting and leisure industry, schools, and unit title bodies corporate. Emma also has experience in the property finance sector, advising banks and other funders in relation to lending and enforcement on property assets, as well as their own property needs. Emma was a Senior Associate at Kensington Swan in Auckland and has also practised overseas.

Jennifer Wademan

Barrister

Jennifer is an experienced litigator and family law expert with an extensive international family law practice. Over the course of her career, she has successfully litigated cases on novel issues in international surrogacy and inter-country adoption, advised clients and counsel around the world on conflicts of law, and appeared in courts at various levels throughout New Zealand. Jennifer began her career as the Judges' Clerk to the Principal Family Court Judge, before advising the New Zealand Government in anticipation of its United Nations examination on the implementation of the UN Convention on the Rights of the Child. For more than a decade now she has been a practising family lawyer and has successfully led cases in all areas of family law from international relocations, surrogacies and adoptions, to complex relationship property and estate cases spanning multiple Courts.

Simon Weil

Partner, Anthony Harper

Simon has been practising in the field of Asset Protection Planning since 1993, both offshore and in New Zealand. He has extensive experience advising clients on asset protection strategies, including Contracting-Out Agreements, Trusts and Wills. He has presented numerous seminars and workshops on the interface between Trusts and the PRA. Simon is a member of TLANZ's Trust Law Committee and the STEP education committee.

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Our aim is to help lawyers New Zealand-wide 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.

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