Estate Planning Conference 2026

Conflict and Independence

Conference Programme for Thursday, 30 July 2026

JustFund

The *Law* Association OF NEW ZEALAND

In Person: ***Registration & Lunch:*** 11:30 AM – 12:30 PM
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 St, Vero Centre,
Auckland CBD

Join us at the Estate Planning Conference 2026

Estate planning is becoming increasingly complex – and issues of conflict and independence are now at the forefront of many practitioners' concerns. When these challenges aren't properly managed, the legal, financial, and personal consequences can be significant.

TLANZ Estate Planning Conference 2026: Conflict and Independence brings together leading experts and industry professionals to examine the real-world issues shaping modern estate planning practice.

Building on the success of the 2025 conference, this year's programme focuses on identifying and managing conflicts, maintaining professional independence, and strengthening your ability to deliver clear, robust advice in challenging situations. Through practical insights, expert presentations, and an interactive panel discussion, you'll gain strategies to confidently navigate these complexities.

Designed for trusts and estates lawyers, private client advisors, and practitioners working in family and elder law, this conference offers valuable perspectives for those advising on high-value estates as well as supporting vulnerable clients.

Stay informed. Strengthen your practice. Be prepared for what's ahead.

Secure your spot today!

Networking Opportunities

Build valuable connections at the Estate Planning Conference 2026. 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, 30 July 2026
12:30 PM – 5:00 PM (4 CPD Hours)
TLANZ, Level 18, Vero Centre, 48 Shortland Street, Auckland CBD

Livestreamed and In Person
Limited in-person spaces available.

	Member	Non-member
Early Bird Pricing (Until 9 July 2026)	$515 +GST	$645 +GST
Full pricing (From 10 July 2026)	$570 +GST	$715 +GST
Early Bird pricing ends 9 July 2026		

Register for Auckland In Person

Register for the Livestream

Discounted group bookings available by emailing
cpd@thelawassociation.nz

The *Programme*

Time	Mins	Session	Presenters
11:30 AM	60	**Registration, Lunch and Networking**	
12:30 PM	5	**Opening by the Chair | Karakia**	**Rebecca Steens**, Partner, Holland Beckett
12:35 PM	20	**Panel Discussion - Who is my Client? Unpacking the conflicts** We kick off the day by tackling the deceptively simple question: who is the client? This panel will set the scene by unpacking how conflicts can arise from the very beginning.	Moderator: **Rebecca Steens** **Amanda Bedford** **Bethan Read** **Mary Rozeboom** **Henry Stokes** **Emma Tonkin**
12:55 PM	40	**S21 Agreements – The Potential to Derail Asset Planning** When assisting clients with estate planning, it's essential to ensure that their objectives for wills work together and compliment their S21 Agreements. However, all too often the existence of these agreements are forgotten or overlooked and many clients do not appreciate the impact their agreement may have on their estate. This session considers the importance of considering S21 Agreements when assisting clients with their estate planning, including the impact of existing agreements and whether new agreements should be made. We will discuss implications on estate planning from *Rimmer v Wilton [2025] NZCA 374*, which is currently before the Supreme Court, and also explore when to engage an independent executor and the optimal timing for doing so.	**Bethan Read**, Special Counsel, Morris Legal
1:35 PM	40	**Planning for Conflict** Estate disputes are no longer the exception—they are an increasingly common feature of modern practice. Against that backdrop, estate-planning practitioners must plan for conflict. This session explores how to anticipate, manage, and minimise disputes through a structured "conflict minimisation toolkit." It surveys the statutory minefield and sets out practical approaches and structures often used to avoid conflict including trusts, contracting out agreements and gifting, amongst other things. Particular emphasis is placed on communication and the careful appointment of executors as a critical, and often underestimated, line of defence against litigation.	**Amanda Bedford**, Director, McCaw Lewis
2:15 PM	20	**Caveats Against Probate** Caveats against probate should be interpreted as a simple protective step—in practice, they can often inflame an estate dispute. This session takes a practical look at the use of caveats in pre-litigation correspondence, drawing on case law and experience. The presentation will set out some of the circumstances where you should consider lodging a caveat, where it is inappropriate, what is set in train by lodging and the risks of leaving a caveat in place without a clear next step. Attention will also be given to practical tactics around responding to caveats and negotiating withdrawals, bearing in mind the consequences of a delay in grant of probate.	**Emma Tonkin**, Partner, Hesketh Henry

The *Programme (Cont'd)*

Time	Mins	Session	Presenters
2:35 PM	10	**In Focus with JustFund** JustFund is transforming estate administration and litigation with flexible funding solutions that help executors, beneficiaries, and law firms manage estate-related costs without upfront financial pressure. This session explores how estate funding can improve cash flow, reduce delays, and support better outcomes for clients and practitioners alike.	**Lauren Milne,** Director, Family Law (NZ)
2:45 PM	30	**Networking / Afternoon Tea Break**	
3:15 PM	40	**Advising on Claims by Estates** The FPA, the TPA and the PRA are all familiar acronyms that we see where moral claimants lay their stake over estate assets. But what about when the script is flipped, and the executor needs to make a claim on behalf of the estate? This presentation will explore what claims by estates look like from the perspective of the executor, what the red flags for executors are and how to navigate them. It will discuss what might trigger the executor becoming a claimant on behalf of the estate. The session will examine the principles of potential claims, executor duties and conflicts of interests where there are relationship property issues and spouse executors. This session is a practical one, examining the issues through real-life case studies and providing advisors to executors with tips, tricks and tools to support them.	**Henry Stokes**, Fiduciary Expert **Mary Rozeboom**, Senior Legal Counsel, Perpetual Guardian
3:55 PM	30	**EPOAs - Conflicts and Independence When Advising** Conflict can arise at every stage of the EPOA process, from drafting and certification through to activation and ongoing operation. This session will explore common areas of conflict involving donors, attorneys, successor attorneys, family members, and advisors, including issues relating to independence, certification requirements under the PPPR Act, competing interests, and who the advisor acts for when disputes arise. The session will also examine practical considerations around the donor's choice of attorney, the dynamics between multiple attorneys, and managing disputes once an EPOA is in effect. Using practical examples and case law, the presenters will highlight common pitfalls, lessons learned, and practical strategies for identifying, managing, and responding to conflict effectively.	**Rebecca Steens**, Partner, Holland Beckett
4:25 PM	30	**Panel Discussion - Conflicts in Action: Practical Examples & Tips from our Panel** To wrap up, we bring the theory to life. Drawing on the day's sessions - from dispute prevention toolkits and caveats, to executor-led claims and EPOA challenges - our panel will share practical insights, war stories, and top tips to help you confidently navigate conflicts when they arise in practice.	Moderator: **Rebecca Steens** **Amanda Bedford** **Bethan Read** **Mary Rozeboom** **Henry Stokes** **Emma Tonkin**
4:55 PM	5	**Closing by the Chair & TLANZ President**	**Rebecca Steens**, Partner, Holland Beckett **Tony Herring**, TLANZ President
5:00 PM	60	**Networking, Refreshments & Canapés**	

Our *Presenters*

Chair of the Conference & Presenter

Rebecca Steens

Partner, 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.

Amanda Bedford,

Director, McCaw Lewis

Amanda leads the Asset Planning at McCaw Lewis Lawyers. She works closely with accountants and advisers to create integrated strategies covering trusts, wills, enduring powers of attorney and relationship-property agreements, amongst other private client services. She is also qualified to practice in Western Australia and her earlier experience in banking and finance at a top-tier Australian firm along with a background in property law grounds her guidance in commercial reality. As a trustee of ConneXu, Angel Casts and Age Concern Waikato, Amanda sits "on the other side" of the table, giving her unique, practical insight that deepens the relevance of her legal advice. She is also a member of the Law Association's trust law committee.

Bethan Read

Special Counsel, Morris Legal

Bethan leads Morris' private client team and is a trusted advisor to clients. Bethan has extensive experience in creating bespoke estate planning and asset protection solutions including trust structures, wills, enduring powers of attorney, relationship agreements and all other private client services. Bethan is qualified in both New Zealand and England and Wales. She began her career at top tier firms in the Channel Islands and London, where she gained high-level international experience in private client matters. More recently, she was director and head of the trust legal team of an international trust company based in New Zealand and joined Morris five years ago to lead their newly formed private client team. Bethan regularly presents at industry conferences in New Zealand on asset protection and estate planning topics.

Our *Presenters (Cont'd)*

Mary Rozeboom

Senior Legal Counsel, Perpetual Guardian

Mary graduated from the University of Waikato in 2013, with a Bachelor of Laws with First Class Honours. Mary has spent time advising on trust administration and provided key support during the implementation of resultant changes following the commencement of the Trusts Act 2019. Mary also spends a lot of time working in the PPPR space, and enjoys seeing results for the protection of vulnerable New Zealanders.

Henry Stokes

Fiduciary Expert

Henry is the former Group General Counsel of Perpetual Guardian. He brings significant fiduciary expertise with considerable experience gained as in-house counsel in trustee companies and also time in private practice. Henry specialises in wills, estates, trusts (both family and charitable) and protection of personal and property rights matters, including appearing in the Family Court, High Court and Court of Appeal. Henry brings experience in leadership, team transformation and productivity and process improvement. He is also a regular presenter for the legal profession's continuing legal education seminars, as well as media interviews for trust, estates and wills related matters.

Emma Tonkin

Partner, Hesketh Henry

Emma is a Partner in the Private Wealth team at Hesketh Henry in Auckland. She advises clients on trusts, estates, relationship property, and succession planning, with a particular focus on complex family wealth structures and those with significant real estate assets. Emma is well known for her practical approach to contentious estates and trust disputes, and for bringing a high degree of empathy to client matters. She regularly acts for trustees, beneficiaries, and high-net-worth individuals, and is a frequent presenter on trusts and estates issues for practitioner audiences. Emma is also an expert in relation to the Overseas Investment Act 2005 assisting clients with both applications and enforcement issues.

For every lawyer, *at every step.*

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