

# EQUITY & TRUSTS CONFERENCE 2024

## THE LAW IN PRACTICE

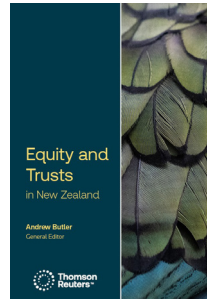
The inaugural Equity & Trusts Conference, organised by Thomson Reuters, is taking place in Auckland on 8 August 2024 at Eden Park.

The conference will provide meaningful and substantive discussion on the many facets of equity and trust law including fiduciary duties, accessory liability, trusts & the PRA, costs and trustee indemnities, tax traps for the unwary, and trusts, ture & tikanga.

The conference aims to provide practical guidance for those that work in the equity and trusts space and focuses on The Law in Practice.

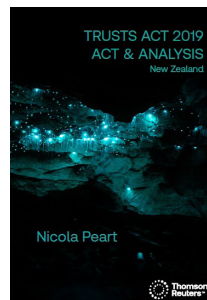
A livestream option is available if you are unable to attend in person.

Keep up to date with trusts legislation, regulation and cases with Thomson Reuters' wide range of information products including:



### Equity and Trusts

*Equity and Trusts in New Zealand* is an authoritative reference providing a comprehensive analysis and discussion of equity and trust law – the only text in New Zealand to address both – from formation, through modern equity through to trusts in context of areas of law, and finally, remedies. The third edition includes new chapters on the Trusts Act 2019 and Taxation of Trusts, Conflict of Laws, and incorporates extensive developments since the second edition.



### Trusts Act 2019: Act and Analysis

*Trusts Act 2019: Act and Analysis* is a guide to and analysis of the Trusts Act 2019, with an extensive introduction and section-based commentary. The introduction contains an overview of the scope of the Trusts Act 2019 and also the trusts that fall outside that scope, and the section-based commentary analyses and applies case law to the legislation. The book provides users with an orderly, practical reflection of the Trusts Act 2019, its principles, and how they are applied by the courts.

Visit [www.thomsonreuters.co.nz](http://www.thomsonreuters.co.nz) for more information.



# EQUITY & TRUSTS CONFERENCE

## THE LAW IN PRACTICE

8 August  
2024

Eden Park, Auckland  
and Livestream

[thomsonreuters.co.nz/events](http://thomsonreuters.co.nz/events)

5.25  
CPD  
HOURS



# Agenda

8.30AM Registration and coffee

9.00AM Welcome from the chair  
**Andrew Butler KC,**  
*Barrister, Thorndon Chambers*

9.10AM Evaluating the Trusts Act 2019  
Professor Emerita Nicola Peart reflects on the Trusts Act 2019, whether it met its intended objectives; what it delivered and what it did not deliver.  
**Professor Emerita Nicola Peart ONZM,**  
*Faculty of Law, University of Otago*

9.55AM Trusts and the PRA  
This session will traverse the history of the courts' treatment of trusts when a relationship breaks down, and consider how practitioners can proactively plan ahead for a division of trust and relationship property in the event a relationship comes to an end.  
**Colette Mackenzie,**  
*Director, Greg Kelly Trust Law*

10.40AM Morning break

11.00AM Fiduciary Duties  
**Andrew Butler KC,**  
*Barrister, Thorndon Chambers*

11.45AM Trustee costs and indemnities  
An examination of the scope and limits of trustee costs and indemnities, and an examination of appropriate trustee actions when seeking and relying on indemnities.  
**Isaac Hikaka, Barrister, Mills Lane Chambers**

12.30PM Lunch

1.20PM Trusts, Ture and Tikanga –  
“It’s all about relationships”  
**Judge Aidan Warren,**  
*Te Kooti Whenua Māori - Māori Land Court*

2.05PM Accessory liability – trends in dishonest assistance and knowing receipt  
In this session, Nathaniel will explore trends and developments in dishonest assistance and knowing receipt, which provide a basis to hold a third party liable for their involvement in another’s breach of trust or fiduciary obligation. Particular emphasis will be placed on the practical means of bringing such claims (which tend to be underused), drawing on a number of recent appellate authorities both in New Zealand and offshore.  
**Nathaniel Walker, Partner, Russell McVeagh**

2.50PM Afternoon break

3.10PM Taxation and Trusts: Tax traps for the unwary  
A look at how New Zealand’s tax rules for trusts apply to selected scenarios.  
**Tim Stewart,**  
*Special Counsel, Mayne Wetherell*

3.55PM Final remarks from the chair  
**Andrew Butler KC,**  
*Barrister, Thorndon Chambers*

4.00PM Conference close

## YOUR INVESTMENT:

Early bird conference pricing

**In-person**  
\$650 +GST\*

**SAVE \$100  
+GST**

**Livestream**  
\$620+GST\*

*\*Early bird pricing ends 25 July 2024*

Register at  
**[thomsonreuters.co.nz/events](https://thomsonreuters.co.nz/events)**

Questions? Contact the events team at  
[eventsanz@thomsonreuters.com](mailto:eventsanz@thomsonreuters.com)