



FINANCIAL & LEGAL FORUM - TUESDAY, 22 FEBRUARY 2005

Museum of New Zealand, Te Papa Tongarewa

AGENDA

0900-0925	Registration & Coffee	
0925-0930	Welcome & Overview	Gordon Noble-Campbell <i>Wellington Branch Chairman - FPIA</i>
0930-0945	The Value Of Professional Advice	Phillip Matthews <i>Chief Executive - FPIA</i>
0945-1015	Asset Protection - (Part 1) <i>personal planning for uncertain events</i>	Jeff Bailey <i>TOWER Risk & Health</i>
1015-1100	Asset Protection - (Part 2) <i>how exposed are you in your business?</i>	John Brown <i>Trusts & Asset Planning Consultant</i>
1100-1115	Break	
1115-1200	The View From The Hill <i>is there a need for compulsory super?</i>	Winston Peters <i>Leader - New Zealand First Party</i>
1200-1230	Baby Boom Or Bust? <i>retirement issues for New Zealanders</i>	Diana Crossan <i>Retirement Commissioner</i>
1230-1315	Lunch	
1315-1345	An Economic Comment On "Our Place" <i>trends in the New Zealand economy</i>	Adrian Orr <i>Deputy Governor and Head of Financial Stability, Reserve Bank Of New Zealand</i>
1345-1415	Why Tax Matters <i>tax planning issues for Kiwis</i>	Paul Hodson <i>Partner, Taxation Services, BDO Spicers</i>
1415-1445	Asset Protection - (Part 3) <i>trusts - who should have one?</i>	Paul Barnett <i>Principal, Barnett Law</i>
1500-1515	Break	
1515-1545	Investing At "Our Place" <i>the opportunities of the local market</i>	Geoff Brown <i>Market Development Manager - NZX</i>
1545-1640	Mapping The Investment Universe <i>a panel discussion on investment options in 2005 and beyond</i>	Donal Curtin <i>Managing Director, Economics NZ</i> David Beattie <i>Chief Investment Officer, Grosvenor</i>
1640-1645	Summary & Conclusion	Gordon Noble-Campbell <i>Wellington Branch Chairman - FPIA</i>





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Meet The Speakers ...



Gordon Noble-Campbell is Chairman of the Wellington Branch of the Financial Planners & Insurance Advisers Association, a position he has held since 2001. He is Head of Client Development & Marketing for BT Funds Management (NZ) Limited, and is a member of the Securities Institute of Australia.



John Brown LLB (VUW), Dip Fin Pl (Waikato), provides consultancy advice in the areas of trusts & asset planning, and business life insurance. Much of John's present work is in an advisory capacity with professional advisers and as a seminar speaker. He is also a consultant senior editor for CCH. In 1999 he wrote the NZ Trusts & Asset Planning Guide. More recently he wrote the New Zealand Master Trusts Guide, explaining family, trading and charitable trusts, trust busting, trustee's duties and beneficiaries' rights.



Winston Peters entered Parliament for the first time as National Party candidate for Hunua in 1978, which he won after an Electoral Petition. He established the NZ First Party in July 1993. He is the Leader of New Zealand First and is the party's spokesperson on Commerce; Economic Development; Finance; Immigration; Racing; Revenue; and SOEs. He is a Member of the Finance and Expenditure Select Committee, and a Member of the Privileges Select Committee. In 1990 he was appointed Minister of Maori Affairs.



Diana Crossan has both worked in the business sector and has held numerous community roles. She is on the NZ Post Board, and is currently on the board of Relationship Services. From 1990 to 1992 she was director of policy for the Ministry of Education; from 1993 to 1995, Group Manager Human Resources, Department of Justice and General Manager for Criminal Justice Development. In 1995 she became a consultant to the Core Project Team for the Electricity SOE Development Group. In 1997 she joined AMP.



Paul Hodson is a Partner in the Taxation Services division of BDO Spicers Wellington. He has specialist knowledge in advising clients on New Zealand and international tax issues. He also has particular expertise in GST, international tax planning, business ownership structuring, estate planning and tax investigations.



Adrian Orr joined the Reserve Bank of New Zealand in April 2003. The Financial Stability Department is responsible for formulating and implementing public policy to promote and maintain a sound and efficient financial system. Major functions include foreign reserves, domestic liquidity management, analysis of financial markets and institutions, and developing and implementing public policy regarding financial institutions.



Paul Barnett is the Principal of BarnettLaw, a technology, commercial and private law practice. Paul qualified at Victoria University of Wellington with an LLB (Hons) in 1971 and with an LLM in 1973. He was admitted as a Barrister and Solicitor of the High Court of New Zealand in 1973. He was a partner in one of New Zealand's top three national law firms from 1980 until 2004 when he established BarnettLaw as a boutique technology, general commercial and personal practice firm.



Geoff Brown has over 20 years experience in stockbroking in New Zealand, the US and the UK. Geoff brings to NZX unrivalled expertise in equities market development, retail & institutional investment strategy and trading. Heading a key group within NZX, Geoff's group is charged with developing and growing NZX's product set which includes listed products, data products and fund products which are managed by NZXFM. The group is also responsible for managing relationships with NZX participants.



Donal Curtin is a business economist. Born in Ireland, Donal worked there and in the United Kingdom in a variety of economic roles. He came to New Zealand in 1985 and during a career with the Bank of New Zealand was its Chief Economist and head of its national private banking unit. In May 2002 he was appointed by Parliament's finance and expenditure select committee to advise it on monetary policy. He is an economic consultant, and member of the Commerce Commission.



David Beattie is the Chief Investment Officer of Grosvenor Financial Services Group. He has over 19 years experience in economic research and investment management, including 16 years with Westpac Financial Services where he held a number of senior roles, including three years as General Manager, Investments.

