Trusts, Estates and Wealth Preservation

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Overview

Wealth management is principally about preserving and enhancing the value of assets. There are two key elements to this – investment and structure.

Banks and other financial institutions provide investment expertise to enable capital growth and income. Lawyers typically provide the strategy and structure intended to protect assets from risk.

Risk to private wealth can arise in many forms including:

- Business activities
- Family disharmony
- Fragmentation
- Death and incapacity
- Economic forces
- Human vulnerabilities
- Lack of cash flow

Private wealth is typically structured, governed and administered in New Zealand in a way which is quite unique to this country. However, traditional practices and default settings are necessarily changing with modern times.

We are a trusted advisor who is across both private and business matters.

We provide clear succession plans for personal and business assets. We strive for simplicity rather than unnecessary complexity.

We use collaborative and interactive software solutions to improve the client experience and create efficiencies.

We consider your affairs holistically and gain a thorough understanding of the circumstances before making recommendations.

Some of the people we deal with don't live in New Zealand, and so they need a reputable local expert who can help with such matters as residency visas, relevant rules and regulations, purchasing property, and setting up or acquiring a business.

Some of the people we deal with have issues to resolve, such as conflict between family members over property or arising from the way wealth has been structured and governed

Many of our clients are professional trustees, law and accounting firms, banks and other financial institutions. We help them manage fiduciary risk and the increasing burden of compliance. We are market leading experts in FATCA/CRS, NZ Foreign Trust Disclosure, AML/CFT and foreign investment in New Zealand.

We have extensive experience in setting up legal arrangements and resolving issues in relation to private wealth.

We are experts in the law and administration of trusts, wills and estates. But we think differently to other advisors in this area and draw on decades of domestic and international experience to provide solutions which better serve the client and do not blindly follow the traditional way of doing things in New Zealand.

Areas of expertise:

Asset Planning

Developing asset plans for families using wills, enduring powers of attorney, property relationship agreements, trusts, companies, charities and other legal arrangements.

Immigration

Assisting high net worth individuals to gain New Zealand visas under the Investor 1 and Investor 2 immigration regimes and then procure property and business assets and set up new businesses.

Governance and Administration of trusts

Advising trustees, lawyers, accountants, directors and financial institutions in the governance and administration of trusts and compliance with regulatory regimes such as FATCA, CRS, Foreign Trust Disclosure and AML/CFT.

Resolving conflict

Resolving conflict and other issues relating to trusts through court proceedings or by alternative methods.

Guides Reports and White Papers

White Paper - Family Offices in a New Zealand Context

Philanthropy White Paper

A New Trusts Law for New Zealand

The importance of a Will

Your Key Contacts

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