

## CHAIR



### **Mary Joy Simpson, Hesketh Henry, Auckland**

Mary Joy leads Hesketh Henry's Private Wealth Team. As a trust and estate planning specialist, she regularly guides older clients as they consider how best to put in place arrangements for the future management and division of their personal assets and associated structures. Mary Joy has previously presented for NZLS CLE on trust drafting, enduring powers of attorney and older client issues.

## SPEAKERS



### **Hon Tracey Martin, Minister for Seniors, Wellington**

Tracey was first elected to Parliament as a New Zealand First list MP based in Warkworth, in 2011. As well as Minister for Seniors, her portfolio includes Minister for Children, Minister of Internal Affairs, and Associate Minister of Education, all of which she has held since October 2017.



### **Associate Professor Angela Ballantyne (BSc, PhD), University of Otago, Wellington**

Dr Ballantyne lectures in Bioethics in the Department of Primary Health Care & General Practice. Her research interests include exploitation, research ethics, vulnerability, the ethics of pregnancy and reproductive technologies, and secondary-use research with clinical data.



### **Terry Baucher, Baucher Consulting Ltd, Auckland**

A member of STEP and the UK Chartered Institute of Taxation, Terry is a tax specialist advising on tax issues including matters such as Inheritance Tax and Capital Gains Tax affecting clients migrating to or from the UK. He is the co-author of Tax and Fairness, May 2017. Terry is a member of the Government's Small Business Council.



### **Sandra Grant, Barrister, Auckland**

Sandra is a senior commercial and civil litigator with significant experience across many aspects of the law. She appears regularly in all of the higher courts and her practice covers a broad spectrum of commercial and civil disputes.

## **SPEAKERS**



### **Mere King, Buddle Findlay, Auckland**

Mere is a member of Buddle Findlay's national employment law team – a team known for their commercial approach. In the last 10 years she has focused her practice on employment law and has gained recognition for her skills in this field.



### **Professor Jo Manning, Faculty of Law, University of Auckland, Auckland**

Prof Manning teaches and has published widely on issues of: health law, policy, and ethics; torts, including negligence; and accident compensation, particularly treatment injury and medical misadventure. Prior to her academic appointment, she worked as a prosecuting lawyer.



### **Fleur McDonald, Pier Law, Christchurch**

Fleur leads the Elder Law team at Pier Law. She deals with all areas of property, asset protection, estate planning, retirement villages, residential care, EPAs and wills with a particular specialty in helping seniors and their families find peace of mind legal solutions.



### **Tina Mitchell, Banking Ombudsman Scheme, Wellington**

Tina has been Deputy Banking Ombudsman since 2017 and leads the scheme's prevention strategy. She has over 20 years' experience leading legal, policy and complaints services. Tina has a BA/LLB (Hons) from Canterbury University.



### **Jared Ormsby, Plymouth Chambers, Christchurch**

Jared practises in the areas of trust and commercial litigation and has advised the Minister of Justice on the Trust Reference Group. He is a member of STEP and is a contributing author to Brookers Equity and Trusts in New Zealand.

## **SPEAKERS**



### **Andrea Pazin, Buddle Findlay, Wellington**

Andrea specialises in employment law, health and safety, alcohol licensing, civil litigation and dispute resolution and education work. She has acted on a range of civil litigation matters contested in various tribunals, the District Court, High Court, and Court of Appeal.



### **Dr Colin Peebles, Canterbury DHB, Christchurch**

Colin is a Consultation-Liaison and Old Age Psychiatrist, and Co-Clinical Director of the CDHB Older Persons Mental Health Service. He recently helped write guidelines for capacity assessment to assist General Practitioners in the region.



### **Maria Young, Cavell Leitch, Christchurch**

Maria leads the trusts and estates team at Cavell Leitch and is a member of STEP. She has a wide experience in trusts, wills, estates and elder law issues and frequently deals with issues of clients' mental capacity. She has presented papers for NZLS CLE and Legalwise.



# CONTENTS

## In session order

### Opening Address

There is no paper for this session ..... 1

*Hon Tracey Marin*

### Capacity – Giving instructions to a medical practitioner

Capacity – Giving instructions to a medical practitioner ..... 3

*Dr Colin Peebles and Maria Young*

### The right to die?

There is no paper for this session ..... 25

*Associate Professor Angela Ballantyne (Wgtn) and Professor Jo Manning (Auck)*

### Taxation and Off-shore Beneficiaries

Taxation and Off-shore beneficiaries ..... 27

*Terry Baucher*

### 2<sup>nd</sup> Relationships

Second relationships ..... 41

*Sandra Grant*

### Best Practice for the Lawyer in Family Conflict

Best practice for the lawyer in family conflict ..... 55

*Jared Ormsby*

### Employment Issues for the Over 55s

Employment issues for the over 55s ..... 69

*Mere King (Auck) and Andrea Pazin (Wgtn)*

### Banking, the Elderly and EPAs

Banking, the elderly and EPAs ..... 79

*Tina Mitchell*

Banking, the elderly and EPAs ..... 89

*Fleur McDonald*



# CONTENTS

## Alphabetical by author/presenter

<b>Author</b>		<b>Title</b>	<b>Page</b>
<b>Ballantyne</b>	Associate Professor Angela	The right to die? ( <i>Wgtn</i> )	25
<b>Baucher</b>	Terry	Taxation and Off-shore Beneficiaries	27
<b>Grant</b>	Sandra	2 <sup>nd</sup> Relationships	41
<b>King</b>	Mere	Employment Issues for the Over 55s ( <i>Auck</i> ) <i>Joint paper with Andrea Pazin</i>	69
<b>Manning</b>	Professor Jo	The right to die? ( <i>Auck</i> )	25
<b>Martin</b>	Hon Tracey	Opening Address	1
<b>McDonald</b>	Fleur	Banking, the Elderly and EPAs	89
<b>Mitchell</b>	Tina	Banking, the Elderly and EPAs	79
<b>Ormsby</b>	Jared	Best Practice for the Lawyer in Family Conflict	55
<b>Pazin</b>	Andrea	Employment Issues for the Over 55s ( <i>Wgtn</i> ) <i>Joint paper with Mere King</i>	69
<b>Peebles</b>	Dr Colin	Capacity – Giving instructions to a medical practitioner <i>Joint paper with Maria Young</i>	3

**Young**

Maria

Capacity – Giving instructions to a medical practitioner

3

*Joint paper with Dr Colin Peebles*



# CONTENTS

<b>OPENING ADDRESS .....</b>	<b>1</b>
<b>CAPACITY – GIVING INSTRUCTIONS TO A MEDICAL PRACTITIONER.....</b>	<b>3</b>
PART A: LEGAL PERSPECTIVE .....	5
PART B: MEDICAL PERSPECTIVE .....	12
APPENDIX ONE .....	19
APPENDIX TWO.....	20
APPENDIX THREE.....	21
<b>THE RIGHT TO DIE? .....</b>	<b>25</b>
<b>TAXATION AND OFF-SHORE BENEFICIARIES.....</b>	<b>27</b>
INTRODUCTION .....	29
AUSTRALIA .....	33
PEOPLE’S REPUBLIC OF CHINA .....	34
INDIA .....	35
UNITED KINGDOM .....	35
UNITED STATES OF AMERICA .....	38
CONCLUSION.....	39
<b>SECOND RELATIONSHIPS .....</b>	<b>41</b>
INTRODUCTION .....	43
STATISTICS .....	43
PRA THE NEW RULES AROUND THE HOUSE .....	46
IMPLICATIONS FOR RESIDENTIAL CARE SUBSIDY .....	53
OPTIONS FOR PROPERTY OCCUPATION AND OWNERSHIP .....	53
<b>BEST PRACTICE FOR THE LAWYER IN FAMILY CONFLICT .....</b>	<b>55</b>
ETHICAL FRAMEWORK .....	57
ENDURING POWERS OF ATTORNEY (EPAs) .....	58
EXECUTION OF WILLS – CAPACITY AND UNDUE INFLUENCE.....	60
THE ROLE OF AN EXECUTOR .....	63
EXECUTORS – NOTIFICATION TO POTENTIAL CLAIMANTS .....	63
EXECUTORS AND PROBATE .....	67
<b>EMPLOYMENT ISSUES FOR THE OVER 55S.....</b>	<b>69</b>
INTRODUCTION .....	71
AGE DISCRIMINATION .....	71
THE LAW .....	72
MAKING A CLAIM UNDER THE HUMAN RIGHTS ACT .....	73
MAKING A CLAIM UNDER THE EMPLOYMENT RELATIONS ACT .....	74
INTERESTING CASES .....	75
ADVERTISING FOR APPLICANTS.....	75
SELECTING APPLICANTS.....	75
OCCUPATIONAL QUALIFIERS .....	76
REDUNDANCY AND REDEPLOYMENT.....	76
FOREIGN LAW .....	77
PRACTICAL ADVICE FOR EMPLOYERS .....	77
<b>BANKING, THE ELDERLY AND EPAS .....</b>	<b>79</b>
CONTEXT .....	81
DELEGATED AUTHORITY .....	82
BANKS’ RESPONSIBILITIES .....	82
BANKING OMBUDSMAN SCHEME CASES .....	83
FINAL COMMENTS .....	87
INTRODUCTION .....	89
THE ISSUES .....	90
THE ANECDOTES .....	92
TIPS TO AVOID ISSUES AT THE BANK .....	94