



Estate and Taxation Planning Council New Zealand Inc

October 2005

Executive Meeting

The speaker for our Christmas function – Bruce Wallace was confirmed. Letters were sent to the two recipients of Life Membership awards confirming that they would receive their awards at the Christmas function. As part of a drive for new members Gary Morgan was to secure a speaking spot at a future FPIA meeting, where we can promote the Council and show what we have to offer. Gary Fitzpatrick will secure a speaker from Guardian Trust.

The establishment of a Wellington chapter was discussed, and Gary Fitzpatrick will discuss in more detail with Mark Cassidy from Guardian Trust in Wellington. While supportive of the idea, the Executive felt we needed to get the Auckland membership in a stronger position before we branched out.

Life Membership

Earlier this year the Council decided to introduce Life Membership awards. Our first two recipients are Alan Alcorn and Gordon Watson who were both founding members of the Council, and gave long service and support on the Executive and as Past Presidents. We hope you able to attend the awards presentation at our Christmas function.

Christmas Function - Your Money Diet

The Council is pleased to offer Members and Guests the opportunity to gather, and celebrate the start of the festive season, and to meet some old friends and enjoy some Christmas Cheer!!

Guest Presenter

Bruce Wallace – is an Auckland based journalist and television industry advocate. His latest book, due out early in 2006, is called *Your Money Diet* and results from his conversations with friends, colleagues and listeners to his radio programme *Your Money*. He is passionate about the need for improved financial literacy across all New Zealanders. He attained a national reputation in this area when he produced and presented the weekly personal investment programme - *Your Money* on National Radio from 2001 to 2005.

He has reported on international events for both British and New Zealand television, been a leading political editor in New Zealand and spent seven years working for Fletcher Challenge as corporate affairs manager. Today he practices journalism and represents the interests of the broadcast television industry as executive director of the New Zealand Television Broadcasters' Council.

Wednesday, 16 November 2004
Drinks start at 5:15pm for a 6.00pm address
Finish by 7.30pm

Auckland Club, 34 Shortland Street, Auckland
Members - No Charge
Non-Members - \$25.00

RSVP by 11 November to: Deeanah Winders, Martelli McKegg, PO Box 5745, Auckland
Email: drw@martellimckegg.co.nz Fax 309-4112; Phone 300-7618

Recent Seminar

Unfortunately our last seminar had to be cancelled due to a lack of numbers. Despite having arranged a top class speaker several months ago, we ended up clashing with two other functions on the same day.

At short notice the Financial Planners & Insurance Advisers (FPIA) arranged the first big pre-election debate between Dr Michael Cullen and National's John Key, which attracted a large number of our members, and potential guests. The same evening STEP's held a function, which also attracted a number of our members.

We look forward to re-scheduling Paul Dyer's presentation next year, when the Superfund will be even larger.

New Members

Dave Lucas

Dave is a Financial Adviser with Financial Wellness Limited. Dave is a member of the Financial Planning and Insurance Advisers Association, and in his role as a financial adviser he has actively worked in estate and tax planning for 24 years. Dave was previously employed with Southern Cross Building Society as a Client Services Manager for 7 years. He is also a member of the Mortgage Brokers Association, and an Associate Life Underwriter.

Kevin Peacock

Kevin is currently Manager of Estate and Financial Planning with the Public Trust. Kevin is a member of the Financial Planning and Insurance Advisers Association, and holds the qualification of Certified Financial Planner (CFP). Kevin has actively worked in the area of estate planning for the Public Trust for 20 years, and is a member of the Trust Special Interest Group (ICANZ).

It is the responsibility for the person who nominates a new member to introduce them at the next function, that's not always possible so please make our new members feel at home.