



Estate and Taxation Planning Council New Zealand Inc

June 2009

THE FIDUCIARY ROLE OF TRUSTEES AND ADVISERS

In New Zealand, Trustees and advisers are becoming increasingly concerned about their fiduciary responsibilities and the potential liability of their actions. Trustees are bound to act honestly, loyally, reasonably, responsibly, diligently, prudently and in good faith.

If you are a Trustee or a professional providing advice, the message is clear; all fiduciaries potentially bear the risk of loss or underperformance if they have not acted prudently. The role of a Trustee is not a role to be taken lightly, especially the role as an independent trustee for someone else. This seminar provides an overview of fiduciary standards of care, asset allocation, preparation of investment policy, due diligence and other related subjects.

Guest Presenter – Martin Jago

Martin Jago works with Plan B Wealth Management and has vast experience within the financial services industry. He joined Plan B after many years with Spicers Financial and Investment Services. Martin has worked in the UK and Australasian markets and has extensive knowledge of mortgages, trusts, insurance, superannuation and investments in those countries.

Martin is a Certified Financial Planner and holds a Bachelor of Science with Honours. He is also an Accredited Investment Fiduciary. This is a professional designation introduced in 2002 by the Centre for Fiduciary Studies in the United States following the investor scepticism brought on by the now infamous Enron and WorldCom scandals.

Thursday, 11 June 2009
Romfords, Tamaki Drive, Auckland
7:15am for a 7:30am start

You are welcome to bring a guest with you to this presentation at a cost of \$25.00 pp

RSVP by 5 June 2009 to Sandra Macaulay
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