



Estate and Taxation Planning Council New Zealand Inc

MEMBER UPDATE OCTOBER 2010

Membership

The Council is thrilled to report a 10% increase in membership over the past three months. A BIG thank you to those members who are actively promoting the Council and encouraging new members. As always, the focus for the Council is to grow awareness and increase membership and we encourage all of our existing members to promote the existence of the Council to your colleagues. The new members are as follows:

Lynette Ball – Financial Planner at Spicers Portfolio Management

Ross North – Senior Client Manager at Guardian Trust

Deeanah Winders – Legal Counsel at Amicorp

Alastair Marsden – Associate Professor of Finance at Auckland University

Phillip Ison – Strategic Wealth Management

Alex Fowler – Strategic Wealth Management

Gavin Busch – Investment Adviser at NZ Financial Planning

Vivienne Bishop – Solicitor at Simpson Grierson

Kok-Seong Tan – HSBC International Trustee Limited

AGM

The 2010 AGM was held on Thursday, 29th July 2010.

The President summarised the feedback received from the membership survey undertaken during the year and confirmed the members' eagerness to see the Council continue. The aim now is to increase our membership base in an attempt to increase attendance at Council seminars. Your Executive is now working with the right people with the expertise to grow awareness of our organisation and encourage professionals within the Council's five disciplines to consider joining the Council.

The financials for the year were slightly lower than the previous year due to a lower membership number and a decrease in interest rates. There were also greater seminar costs for the year with four seminars held.

The Executive tabled two minor changes to the Constitution which were adopted by the members. The Constitution has now been updated accordingly.

The Executive farewelled Gary Morgan from the team after some ten plus years of voluntary commitment to the Executive. The Executive thanks Gary for his time and commitment over the years. Gary has been replaced on the Executive by Lindsay Pope.

Website

The Council is now moving ahead with making our website exciting and interactive. Our survey results indicated low usage of the website, and it is therefore time to spruce up our site and incorporate more information relating to the Council's membership and activities. All future seminar information and newsletters will be uploaded to the website and an e-mail link to the website will be sent to our Members when new information has been uploaded. Watch this space over the coming months!!

Our website has a Library incorporated within the site, and if you come across any interest articles or information which you believe will be of interest to Council Members, please contact the Council's Secretary who will arrange for the information to be uploaded to the Council's Library.

Next Seminar

With the Christmas season looming, the Council will hold a social gathering in December to give our Members and their guests the opportunity to meet with fellow members over a glass of wine, or two. Robert Knox will also do a short talk on his experiences from his recent sailing excursion from Los Angeles to New Zealand. We hope to see you there.

Our next Seminar is: Estate & Tax Planning Council Christmas Function
Date Thursday, 2nd December 2010
Time 5:15pm to 7:30pm
Venue BDO, Level 8, 120 Albert Street, Auckland