



# Estate and Taxation Planning Council New Zealand Inc

March 2004

Dear Member

## Executive Report

This calendar year will see your Executive working hard to bring you three breakfast seminars and an evening Christmas function scheduled for November. Please see overleaf for dates, and mark your diaries! Improving communication with members continues to feature on your Executive's agenda papers, and to this end we continue to work on the Council's web site ([etpc.org.nz](http://etpc.org.nz)). This website also includes a password protected membership list. The objective of this website is to improve communications with members, and build a resource of benefit to members. Please visit the site and have a look.

As always, your Executive welcomes feedback from members, and topics for future seminars are always gratefully received.

## Next Seminar

Our first breakfast seminar for 2004 is on the topic of " The liability implications of e-mail" with Phil Hobson of Marsh Limited as our guest presenter.

Date	Wednesday 24 March
Time	7.15am for a 7.30am start
Venue	Romfords, Tamaki Drive, Mission Bay

Given the increasing use of e-mail at work, it raises a number of issues about company liability, especially if internal communications and sensitive information is sent to the wrong people. There have been some high profile court cases in the United States – Enron, World Com, and CS First Boston where internal e-mails have been a major source of evidence for the prosecutors.

## New Members

Mike Newton is a Director of Select Asset Management, and has been working in the investment management and banking profession since 1983. Mike's roles over the past ten years have been. Chief Operating Officer of BT Funds Management, Director Investment Services with Sovereign Group, and General Manager of Retail Funds Management with the Zurich Group. He has also held senior management roles with Kleinwort Benson, Westpac, American Express and Barclays Bank.

Mike has also been actively involved as a board member for the Insurance and Savings Ombudsman, Deputy Chairman of the Investment Insurance and Savings Association (ISI), and Chairman of the Legislative Committee of the (ISI).

Ian Mellett is a member of the New Zealand Law Society, and has been actively involved in estate and tax planning for 10 years. Ian worked as a solicitor for Deloitte & Touche, both in South Africa and New Zealand, before working for almost four years with Martelli McKegg, Auckland. Ian has recently joined Miller Bradley. Ian is a member of the Rotary Club of Remuera, and is a keen cricket and rugby fan.

## 2004 Programme

The Executive has set out the following activities for this year, so please mark these dates in your calendar.

24 March	Breakfast Seminar / Speaker
16 June	Breakfast Seminar / Speaker
7 July	Annual General Meeting
25 August	Breakfast Seminar / Speaker
17 November	Christmas Function & Speaker