

# Chambers

High Net Worth

2020

## Leading HNW Professionals worldwide

### New Zealand

**How lawyers are ranked**

Every year we carry out thousands of in-depth interviews with clients in order to assess the reputations and expertise of business lawyers worldwide. The qualities we look for (and which determine rankings) include technical legal ability, professional conduct, client service, commercial awareness/astuteness, diligence, commitment, and other qualities most valued by the client.

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## Private Wealth Law

Private Wealth Law
<b>Leading Firms</b>
<b>Band 1</b>
Chapman Tripp
Greg Kelly Law Limited
TGT Legal
<b>Band 2</b>
Hesketh Henry
Dentons Kensington Swan
<b>Band 3</b>
Cone Marshall
Martelli McKegg Wells & Cormack
<b>Leading Individuals</b>
<b>Band 1</b>
Atchinson Catherine Martelli McKegg Wells
Brandts-Giesen Henry Dentons Kensington Swan
Gilbert Alison Brookfields (ORL) ◊
Hart John W John W Hart Limited (ORL) ◊
Kelly Greg Greg Kelly Law Limited
Patterson Bill Patterson Hopkins (ORL) ◊
Simpson Mary Joy Hesketh Henry
Tesiram Pravir TGT Legal
Young Arthur Chapman Tripp
<b>Band 2</b>
Cone Geoffrey Cone Marshall
Kelly Chris Greg Kelly Law Limited
Moses Juliet TGT Legal
Taylor Richard TGT Legal
Vaealiki Israel Jackson Russell Lawyers (ORL) ◊
Walker Jarrod Chapman Tripp
Weil Simon Anthony Harper (ORL) ◊
Wilkie Philippa Chapman Tripp
◊ (ORL) = Other Ranked Lawyer.
Alphabetical within each band. Band 1 is highest.
<b>Band 1</b>

**Chapman Tripp**

Chapman Tripp is a respected full-service firm with a strong private client and trust practice. The team advises wealthy New Zealand clients with significant business interests on domestic and international matters, including estate planning, trust administration and philanthropic planning.

*“The service provided by Chapman Tripp’s*

*private client team is always exceptional,”* observes an interviewee, adding: “They really go the extra mile for clients wherever possible and care deeply about the client’s needs and wants. In my view, the depth and breadth of the team’s experience makes them the best private client team in town, with the added bonus that every team member is always a pleasure to work with.”

**Notable practitioners**

**Arthur Young** is the firm’s senior partner and he leads its private client practice. He is hugely respected among interviewees for his work advising high net worth clients on trusts and estates matters. Young is described by a source as “the go-to guy for many clients on succession planning.” Another commentator says that he “he has fantastic wisdom, and very high-level legal instincts that are seldom wrong.”

**Jarrod Walker** handles trust and asset planning matters for wealthy clients and also assists non-profit entities with governance issues. “He’s always cool, calm and collected; he gets the job done and achieves excellent results without any nonsense or fuss,” explains an interviewee, and another source says: “I have found Jarrod to be very technically strong, practical and easy to work with.”

**Philippa Wilkie** is praised by a source for her “excellent reputation in the charities, trusts and private client spaces.” She regularly advises individuals and families on the creation and restructuring of trusts, and also handles matters for non-profits. A fellow lawyer says that Wilkie is “very capable” and has an “excellent client base,” before adding that she is “very agreeable to work with.”

**Greg Kelly Law Limited**

Wellington-based Greg Kelly Law is a boutique firm focused on trusts, wills and estates work. “It’s a really strong brand, and quite rightly so,” says one commentator. The firm advises on the creation and interpretation of wills, estate administration and the establishment and administration of trusts.

“The real strength is in their technical knowledge,” says one source.

**Notable practitioners**

**Greg Kelly** has “an immense depth of technical knowledge,” says one interviewee. Another notes: “He’s a senior practitioner, and a very well-regarded lawyer in the trusts area. He’s an excellent technician as a lawyer, personable and easy to talk to.” In addition to his work with clients, Kelly has written and presented numerous papers on trusts and estates matters.

**Chris Kelly** is a consultant at the firm and is a highly experienced private client practitioner. “He’s very detailed, and focused on legal issues and opinions,” says a source.

**TGT Legal**

TGT Legal is “a very strong brand with good people,” says a source. This boutique advises clients on trusts and succession planning matters, including business successions, tax plans and estate administration.

“It’s strong in technical areas – a very successful group, primarily in the trusts area,” reports a commentator.

**Notable practitioners**

**Pravir Tesiram** handles trust, tax and estate planning for high net worth families and individuals. “I have a huge amount of respect for him, because he has a huge knowledge of the field,” says one source. Another comments that he has “a good following,” and “a strong practice which he manages well.”

**Juliet Moses** assists with estate, succession and charitable trust matters. “She’s a smart and switched-on lawyer,” says a source, and another describes her as “a strong practitioner who produces excellent thought leadership, and a compelling speaker.”

**Richard Taylor** focuses on succession, estate, tax and trust matters. “He has a very strong practice of affluent New Zealanders,” says a fellow lawyer; “he’s much trusted and very capable.”

## Band 2

### Hesketh Henry

Hesketh Henry is a well-known full-service law firm with a respected private wealth practice. "I'd be happy to refer work to them," says a New Zealand-based lawyer, who also highlights the firm for its ability to tackle multidisciplinary work.

The firm handles estate planning and relationship property work, and is particularly notable for advising on trusts. "They would do an excellent job on any trust matter," reports an interviewee

#### Notable practitioners

**Mary Joy Simpson** is "well regarded" in New Zealand, according to a local source. "She's very, very good, with an excellent academic approach," says an interviewee. She advises wealthy clients on trusts and also handles relationship property and estate planning matters.

### Dentons Kensington Swan

New Zealand full-service firm Kensington Swan recently merged with global outfit Dentons. The private wealth team does "super work" advising institutional clients, including accountants and fiduciaries, as well as domestic and international high net worth individuals and families.

The private wealth lawyers at Dentons are praised by commentators for their client service. "The team goes to great lengths to understand clients' situations and priorities, and provide careful and robust advice on asset protection," says an interviewee. "They have given high-level and thoughtful advice and taken the time to understand our landscape and to apply it to the legal framework," explains a source, who adds: "Their client service is both incredibly professional and warm and approachable. We have felt very supported both legally and professionally."

#### Notable practitioners

**Henry Brandts-Giesen** leads the private wealth practice. He is a respected figure in the New Zealand market who brings a great deal of offshore experience to his work advising wealthy domestic and international clients. "I would classify Henry as a pro-

gressive lawyer," says a source, adding: "He doesn't just accept the old way of doing things, he looks to offer advice that simplifies affairs for the client." Another recognises him for his "advanced knowledge of the developments in the law, excellent presentation skills, and clarity of thinking."

## Band 3

### Cone Marshall

Cone Marshall is "known for its expertise in administering non-resident and non-domiciled clients," according to one source, who continues: "It's exceptional for international structures, and the best in the field of fiduciary services."

"It's a good firm with a significant foreign family client base," observes a market insider. Another interviewee says that the firm is "excellent for offshore work."

#### Notable practitioners

**Geoffrey Cone** is the founder and senior principal of the firm. He is especially well known among interviewees for advising clients on international and offshore matters. A source says that he has "a real depth of expertise in offshore trusts," and another states: "He's so highly regarded for foreign and offshore trust work."

### Martelli McKegg Wells & Cormack

Martelli McKegg Wells & Cormack is "a very well-established and respected firm," according to a local source. The firm is full-service, but has a notable private wealth practice.

"I'm happy to refer work to them," says a market commentator, who also states that the firm has "good depth," Martelli McKegg is based in Auckland.

#### Notable practitioners

**Catherine Atchinson** is a "very well-known and respected figure" in the New Zealand private wealth community, according to a source. "She's immensely visible in the market for high net worth families," says an interviewee. Atchinson regularly advises clients on estate planning, trusts and family and business asset protection techniques.

## Other Ranked Lawyers

**Alison Gilbert** of Brookfields specialises in private client matters, including estate and tax planning, and also advises clients on contentious trusts and estates matters. "She's a very well-connected and well-respected lawyer," says one commentator. Another describes her as "very capable." Gilbert leads the private client team at the firm.

**John Hart** of John W Hart Limited has "a very strong and well-respected practice and a good client base," observes an interviewee. He is a well-known figure in the New Zealand private wealth community and is particularly notable for working with clients on offshore structuring. "He does lots of work in the offshore space," says a source, adding: "He's a real expert in offshore and fiduciary services."

**Bill Patterson** of Patterson Hopkins is respected for his experience and technical ability. He is described as "the senior practitioner in this space" by a source, who continues: "He is highly regarded as the expert in this field, and noted for his impeccable skill." Another commentator says that he is "a leading light in this area."

**Israel Vaealiki** is "definitely up and coming, hungry and smart," according to an interviewee. Vaealiki is head of trusts and succession planning at Jackson Russell Lawyers. "He's a solid individual; foreign trusts are his real strength, although he's good on other trusts as well," observes a source, and another notes: "He's a strong, practical lawyer. We would happily refer matters to him - he's very, very capable."

**Simon Weil** of Anthony Harper is "very capable, with a strong following," according to a fellow lawyer, who also says that he is a "very safe pair of hands for any matter." He advises wealthy individuals and families and fiduciaries on the creation and administration of trusts, and also assists with Powers of Attorney and estate administration. An interviewee says: "He is friendly, approachable, and has a strong work ethic. He cares about the clients' goals and thinks creatively to resolve any issues."

## Accountants & Tax Advisers

Accountants & Tax Advisers
<b>Leading Firms</b>
<b>BDO</b>
<b>Deloitte</b>
<b>KPMG International</b>
<b>PricewaterhouseCoopers LLP</b>

### BDO

BDO has “an excellent group,” according to one source, and another describes it as “a good all-round accounting firm for businesses and wealthy families.”

The team advises on trusts, estates and succession planning, including business succession strategies, asset protection and wealth transfers.

#### Key contact:

Iain Craig, Tax Partner and Tax National Leader

### Deloitte

Deloitte is described as “our first choice for our clients” by one market commentator, who also says that the firm works with “lots of wealthy families.” Another source states that “they have a dedicated focus on private client. It’s an enthusiastic team with a good following.”

Deloitte’s well-regarded team works with high net worth individuals and families, and their closely held enterprises, on tax, wealth preservation matters and business succession plans.

#### Key contact:

Joanne McCrae, Tax Partner

### KPMG International

KPMG’s private enterprises practice advises high net worth clients on personal and business matters. Its broad range of services include family business governance and succession planning advice.

Members of the team can also assist with per-

sonal tax and trusts. A market commentator says that the “client service is very deft.”

#### Key contacts:

Paul McPadden, National Managing Partner – Private Enterprises

Havana Mar, Partner – Private Enterprises

### PricewaterhouseCoopers LLP

PwC has a strong presence in New Zealand, with offices on the North and South Islands. A local market commentator notes that PwC has “the largest commercial practice with a very good private wealth group.”

The firm can provide high net worth clients with trust structuring advice, as well as personal tax, wealth planning and business assistance.

#### Key contact:

Brendan Catchpole, Managing Partner, Financial Advisory Services

## Private Banks

Private Banks
<b>Leading Firms</b>
<b>ANZ Private Bank</b>
<b>BNZ Private Bank</b>

### ANZ Private Bank

ANZ is one of the leading players in the New Zealand private banking market. “It’s very popular with my high net worth clients,” says one local commentator.

The bank is recognised for providing its private banking clients with a “really bespoke service,” which includes investment advice, access to lending facilities and insurance arrangements.

### BNZ Private Bank

BNZ Private Bank is “definitely safe for any high net worth client,” states a New Zealand-based lawyer. Another market commentator says: “BNZ is excellent for HNW families, particularly international clients.”

Bank of New Zealand’s private banking offering includes family office and fiduciary services and migrant investor assistance, as well as wealth planning, investment and financing facilities.

## Trust Companies

Trust Companies
<b>Leading Firms</b>
<b>Perpetual Guardian</b>

### Perpetual Guardian

Perpetual Guardian offers a comprehensive range of services to affluent families and individuals. It assists clients with investments and philanthropic plans, in addition to trust and estate administration.

Sources in New Zealand praise Perpetual Guardian for the quality of its advisers. “They are excellent at what they do, their high net

worth team is good to work with,” observes an interviewee. Another commentator says that “it is a very capable group with some highly respectable people.”

#### Key contacts:

Matthew Pausina, Head of Operations, Private Client Services

Michelle Pope, Head of Client Care

Harry White, Family Office Executive

## Wealth Managers

Wealth Managers	Craigs Investment Partners	JBWere Private Wealth Management
Leading Firms	Craigs Investment Partners has 19 offices across New Zealand and offers wealthy clients discretionary and managed investment services.	advisers with depth of experience," says a lawyer. "They have the biggest following in New Zealand for private client work," observes another interviewee, adding: "Their people are outstanding."
Craigs Investment Partners	The firm is "an important player" in the market, according to a local source, and another interviewee says that "they are very much respected."	<b>Key contacts:</b> Chris West, Managing Director and Wealth Management Adviser Martin Poulsen, Managing Director and Wealth Management Adviser
Forsyth Barr	<b>Forsyth Barr</b> Forsyth Barr's "very good people" provide respected investment services to wealthy individuals and families. "It's a huge practice and a very eminent group," observes a local lawyer. Another commentator says that the firm has "a capable group with breadth of experience."	<b>Jarden</b> Jarden is a "truly excellent" provider of investment assistance and other wealth management services. Sources comment in particular on the high quality of the staff at Jarden. "They have
Jarden		JBWere Private Wealth Management has "an excellent team and is an important player in the market," according to a local private client lawyer. It advises high net worth individuals and families on investment options and also works with philanthropic entities on strategy and investments. A source says that JBWere's "advisers work with the most high net worth individuals," and another commentator highlights the firm for its "brilliant client service."
JBWere Private Wealth Management		