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New Zealand

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**2019**

## 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	
Leading Firms	
<b>Band 1</b>	
Greg Kelly Law Limited	
TGT Legal	
<b>Band 2</b>	
Chapman Tripp	
Hesketh Henry	
Kensington Swan	
Martelli McKegg Wells & Cormack	
Leading Individuals	
<b>Band 1</b>	
Atchinson Catherine	Martelli McKegg Wells
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>	
Brandts-Giesen Henry	Kensington Swan
Cone Geoffrey	Cone Marshall (ORL) ◇
Eastgate Peter	Cavell Leitch (ORL) ◇
Moses Juliet	TGT Legal
Taylor Richard	TGT Legal
Vaealiki Israel	Jackson Russell Lawyers (ORL) ◇
Walker Jarrod	Chapman Tripp
Weil Simon	Anthony Harper (ORL) ◇
Star associates	
Wilkie Phillippa	Chapman Tripp
◇ (ORL) = Other Ranked Lawyer.	
Alphabetical within each band. Band 1 is highest.	

### Band 1

#### Greg Kelly Law Limited

Greg Kelly Law is a Wellington-based boutique firm specialising in wills, estates and trusts. It is recognised as a “very good firm” with a strong client base.

The team at Greg Kelly Law represents individual clients, as well as providing specialist advice to law firms and trust companies. One legal source commends its specialist advice as “pretty exceptional.”

#### Notable practitioners

**Greg Kelly** has a “good reputation across

the country” for trusts and estates work. His academic and professional expertise is clear, with another commentator declaring that “law almost runs in his blood.” Sources agree that he is “very good technically” and a “well-respected practitioner.”

#### TGT Legal

TGT Legal is considered a “specialist in its area” of trust and private client law. One source highlights that “their strength is that they are purely a boutique trust practice.” Another enthuses that the lawyers are among “the forefront players in Auckland” for this work.

TGT Legal advises on personal asset and tax planning, both domestically and for international clients. It is recognised as “one of the largest teams in this area,” and commentators praise the breadth of its trust work.

#### Notable practitioners

**Pravir Tesiram** focuses mainly on trust law and tax planning. One commentator notes that he is “very well known for his technical advice, particularly involving tax issues,” and another praises his “good reputation” and “strong client base.” A further interviewee describes Tesiram as “uber-technical” and says that “he’s certainly the guy that, if we had anything too difficult, we would use him in preference to anybody; we’d go straight to Pravir for something prickly.”

**Juliet Moses** advises families and trustees on asset planning, management of trusts, succession and charitable trusts. She is well known for her work in the private client community in Auckland, particularly for her role as chair of the education committee of the Society of Trust and Estate Practitioners New Zealand. She also advises trustees and employers on superannuation schemes.

**Richard Taylor** has significant experience in all aspects of trust law, including asset planning, succession and estates. He advises families, trustees and investment advisers. Taylor is described as having a strong client base and a “good reputation” in this area.

### Band 2

#### Chapman Tripp

Chapman Tripp is a full-service firm with offices in Auckland, Wellington and Christchurch. Its private client team advises New Zealand families as well as offshore clients and charities on technical trust issues, asset planning and succession matters.

One legal source says the Chapman Tripp team’s technical ability is “the best in the market” and praises their depth and breadth of experience, stating that “they have seen it all.” The team’s subject matter expertise is highlighted by a number of commentators as a particular strength.

#### Notable practitioners

**Arthur Young** heads the private client team at Chapman Tripp. A peer states that Young is “a legend of this practice area in New Zealand, and with more depth and breadth than anyone.” He advises on all aspects of trusts and estates law and acts as a trustee for many significant family trusts.

**Jarrod Walker** advises clients on trust matters and personal asset planning. One source notes that Walker is “highly responsive and a pleasure to deal with,” while another states that he is “kind and polite, and it is always a pleasure to work with him.” A fellow New Zealand lawyer notes that he is also a very capable tax practitioner.

**Phillippa Wilkie** specialises in private client and trust work and advises individuals, families and trustees. One commentator notes that “she goes the extra mile, working to tight deadlines and always delivering better than expected,” while a peer notes that she is “technically very strong, astute, practical and not afraid to express a view.” Another source states that Wilkie “displays a high level of expertise, clarity of thought and practicality.”

#### Hesketh Henry

The private wealth team at Hesketh Henry advises individuals, families and businesses on estate planning, asset protection and wealth management.

One interviewee says Hesketh Henry is “one

of the top estate planning firms in Auckland, and has the greatest expertise in this practice area of perhaps any firm in the city." Another describes the team as "dynamite lawyers."

#### Notable practitioners

**Mary Joy Simpson** is a specialist in trust law with significant experience in estate planning, relationship property planning and estate management. One client enthuses that "Mary Joy Simpson is regarded as one of the best estate planning practitioners in the city, and I think her reputation is well deserved."

#### Kensington Swan

Kensington Swan is a full-service law firm with offices in Auckland and Wellington. One commentator states that "Kensington Swan is a well-recognised, top-tier firm with quality lawyers and a good reputation."

The team at Kensington Swan advises professional trustees, financial institutions and other law firms and accountants. Its lawyers are praised for their "strong technical knowledge" and "communication, in particular using plain English with clients so they understand." They also win praise for "really looking to add value to the relationship along the way."

#### Notable practitioners

**Henry Brandts-Giesen** is head of the private wealth team at Kensington Swan. He advises high net worth individuals and has significant offshore experience. A peer states that "on the technical side of things he would be at the top of his game. He is very well respected by banks and other referrers of work in New Zealand." A market commentator reports that "his style is both approachable and pragmatic, a combination that is conducive to good client outcomes."

#### Martelli McKegg Wells & Cormack

Martelli McKegg is a full-service law firm based in Auckland. The trust and estates team advises on asset planning, trust planning and restructuring, and charitable trusts.

Martelli McKegg is considered to have a "very strong" private client team. Sources say it is a "very professional firm with quality trust advisers who are very engaging with their beneficiaries, fellow trustees and professional advisers."

#### Notable practitioners

**Catherine Atchinson** is a leading trusts and estates lawyer with experience in family and business asset protection, trust management and estate planning, among other matters. Atchinson is seen as "a safe pair of hands," who is "technically very capable." One peer enthuses that she is "very well respected. She is very good. She is an excellent practitioner to deal with. She is pragmatic and easy to deal with, and gracious and fantastic with clients."

#### Other Ranked Lawyers

**Geoffrey Cone** of Cone Marshall specialises in international trust and tax planning and is regarded as "the expert in foreign trusts in New Zealand." He is a regular contributor to international and New Zealand-based publications on international trusts topics.

**Peter Eastgate** of Cavell Leitch advises on all aspects of trust law. He has clients throughout New Zealand and internationally, and he also advises other NZ professionals. He regularly advises on complex estate and trust matters and is a specialist in wills and succession law.

**Alison Gilbert** heads the trust and manage-

ment services team of Brookfields. She is an expert in trusts, estates, relationship property, elder law, and contentious trusts and estates cases. Gilbert is lauded as being "very capable" and "very committed in the area." Another legal source enthuses that "when you have a problematic file that needs steady hands, she is the go-to person."

**John Hart** of John W Hart Limited is a specialist trust and tax practitioner who is particularly well known for his foreign trust work. He is "very well respected and enjoys a good reputation," sources say. One lawyer notes that "he is technically sound. He is courageous, he is not afraid to take a position or commit to a position that may be arguable. He is courageous and commercial in his approach."

**Bill Patterson** of Patterson Hopkins is a leading trust expert in New Zealand. Sources report that "he has an excellent reputation" and is "very well respected in the New Zealand market." One trusts lawyer says that Patterson "would be the most respected in a technical sense."

**Israel Vaealiki** is head of trusts and succession planning at Jackson Russell Lawyers in Auckland. He is widely experienced in trust and estate administration, as well as international and cross-border succession planning.

**Simon Weil** of Anthony Harper is a specialist in trusts and asset protection planning. Weil also has extensive experience working with NZ foreign trusts. He is said to be "very good technically" and is "accommodating, responsive, professional and flexible." A market commentator states that "his personal style is excellent and he is extremely knowledgeable when it comes to the twists and turns of how law is evolving."

## ACCOUNTANTS & TAX ADVISERS

Accountants & Tax Advisers
Leading Firms
BDO
Deloitte
KPMG International

#### BDO

BDO has offices across New Zealand. Its private client services team advises high net worth clients on estates, trusts, business structuring and succession planning.

One source describes it as a "very professional firm, with quality advisers who are very engaging with their beneficiaries, fellow trustees and professional advisers."

#### Key contact:

Iain Craig, Tax Partner and Tax National Leader

#### Deloitte

Deloitte New Zealand provides tax and family office services to a range of clients, both domestic and international. The Deloitte Private team works with private companies and their owners on questions of tax residency and domicile, estate planning and setting up and managing family offices.

#### Key contact:

Joanne McCrae, Tax Partner

#### KPMG International

KPMG's team advises high net worth clients with regard to trusts and personal taxes, asset planning and tax compliance, estate and succession planning.

The firm also has a notable practice working for wealth management organisations on tax, audit and consulting matters.

#### Key contact:

Havana Mar, Partner – Private Enterprise

## PRIVATE BANKS

Private Banks		
Leading Firms	<b>ANZ Private Bank</b>	<b>BNZ Private Bank</b>
ANZ Private Bank	ANZ Private Bank offers high net worth clients wealth planning and investment management advice, as well as estate planning services. It also offers lending services and advice on philanthropy.	As well as traditional credit and deposit banking, BNZ Private Bank provides wealth planning and investment management services to high net worth individuals and family offices. BNZ also provides trustee services to institutions.
BNZ Private Bank	One source comments that ANZ Private “is offering what a family office in Zürich would offer; what they are trying to offer their clients is the full package of care.” This interviewee adds that ANZ is “among the strongest” private banks in New Zealand.	<b>Key contact:</b> Donna Nicolof, General Manager – Private Bank & Wealth Advisory
	<b>Key contact:</b> Ben Kelleher, General Manager Auckland Northland and Migrant Banking	

## TRUST COMPANIES

Trust Companies	
Leading Firms	<b>Perpetual Guardian</b>
Perpetual Guardian	Perpetual Guardian works with high net worth clients throughout New Zealand. The team provides estate planning and administration services. Perpetual Guardian also advises on and manages family and charitable trusts, and has a suite of investment advisory services.

## WEALTH MANAGERS

Wealth Managers		
Leading Firms	<b>First NZ Capital</b>	<b>JBWere Private Wealth Management</b>
Craigs Investment Partners	First NZ Capital provides wealth management and investment banking services to its high net worth clients. First NZ Capital works with Credit Suisse to provide offshore investment banking services. The team advises families, trusts and international investors.	JBWere Private Wealth Management has offices across New Zealand and Australia. It provides investment management, financial planning and related services to high net worth individuals and institutional clients.
First NZ Capital	<b>Key contact:</b> Martin Poulsen, Managing Director and Wealth Management Adviser	JBWere Private Wealth Management also provides estate and succession planning services, and advises its wealthy families on philanthropy strategy.
Forsyth Barr	<b>Forsyth Barr</b>	<b>Key contact:</b> Jon Tierney, Executive Director
JBWere Private Wealth Management	Forsyth Barr has offices throughout New Zealand. The firm offers investment advice, portfolio management and investment banking to its high net worth clients, both domestic and international.	
<b>Craigs Investment Partners</b>		
Craigs Investment Partners operates throughout New Zealand. The firm offers investment advice and administration to high net worth individuals, corporations and trustees. The personal wealth team also offers sharebroking and retirement planning expertise.		