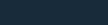
BUDDLE FINDLAY

Private Wealth.

Our streamlined, straightforward approach to protecting your personal assets.



buddlefindlay.com









We have a dedicated team of specialists across all three offices who advise on a range of private client matters. As a full service law firm, we can also provide any other legal assistance that you might require in relation to your personal asset plan.

Our personal asset planning clients include individuals, families, trustees of private and charitable trusts, directors of companies and business owners.

Tony Wilkinson

Partner, Auckland DDI • 64 9 358 7066 M • 64 27 476 6587 tony.wilkinson@buddlefindlay.com

Julia Gabrielle

Partner, Christchurch DDI • 64 3 371 3521 M • 64 27 683 4373 julia.gabrielle@buddlefindlay.com

Anna Wishart

Senior Associate, Christchurch DDI • 64 3 371 3572 M • 64 21 174 6474 anna.wishart@buddlefindlay.com

Danielle Elley

Senior Associate, Christchurch DDI • 64 3 371 3507 M • 64 27 444 7270 danielle.elley@buddlefindlay.com



Private wealth

Safeguarding your assets can be hard, and knowing when and how much specialist legal support you require can be even harder. At Buddle Findlay, we work with high net-worth individuals and families to help protect their assets for generations to come.

Personal asset planning is a very personal process – some people may simply need a trust, a new will or a new relationship property agreement. Others may need a bespoke succession plan for the family business, a family constitution or assistance in establishing a family office structure or other family governance arrangements.

Our streamlined approach to personal asset planning uses a predictable three-phase process to understand your needs, investigate any risk areas and make any changes necessary so that you can be confident that your family's assets are secure now, and into the future.



Three steps

ONE

Getting to know you

First, we'd like to get to know you.

We will lead you through a comprehensive examination of your personal affairs so that we can undertake a legal "health check" of your current personal asset protection mechanisms.

Deliverables

- Provide a report highlighting strengths and identifying any areas of weakness of your current personal asset planning arrangements
- Present a cost estimate for any areas that merit a more detailed review.

TWO

Getting to grips

If a more detailed review of any specific area is recommended, we will take a closer look.

We will provide a full report outlining our recommendations and your options to ensure you have a complete asset protection plan that is appropriate for your family's needs.

Deliverables

- Detailed review any aspects identified in phase 1
- Comprehensive report, including:
- recommendations to update or improve existing arrangements
- essential and ideal options, where appropriate.

THREE

Getting sorted

Let's get things sorted.

Once you've had an opportunity to review our recommendations, you can tell us how you want to proceed.

With your direction, we will take care of all the hard work required to ensure your family's assets are secure in consultation, if necessary, with our other legal experts and your accountant or financial adviser.

Deliverables

 Implementation of agreed legal work.

BUDDLE FINDLAY

AUCKLAND

188 Quay Street, PO Box 1433 Auckland 1140, New Zealand DX • CP24024 P • 64 9 358 2555

WELLINGTON

Aon Centre, 1 Willis Street, PO Box 2694 Wellington 6140, New Zealand DX • SP20201 P • 64 4 499 4242

CHRISTCHURCH

83 Victoria Street, PO Box 322 Christchurch 8140, New Zealand DX • WX11135 P • 64 3 379 1747

buddlefindlay.com