

## CHAIR



### **Mathew McKay, Bell Gully, Auckland**

Mathew is a partner in Bell Gully's tax team. He advises on all aspects of NZ corporate tax law, including tax issues affecting mergers and acquisitions, financing arrangements and funds management. Mathew regularly assists clients in disputes with the IRD during the dispute resolution phase and in court challenge proceedings.

## SPEAKERS



### **Tim Clarke, Bell Gully, Auckland**

Tim is a partner in Bell Gully's litigation department in Auckland. He has broad experience acting for corporate clients in a range of corporate and commercial disputes and employment law matters. Before joining Bell Gully, Tim spent three years in Hong Kong with Baker & McKenzie and from 2001-2004 was based in the British Virgin Islands with Harneys. He has also worked at other leading law firms in New Zealand.



### **Shaun Connolly, Russell McVeagh, Wellington**

Shaun has been a partner at Russell McVeagh since 2008. He advises on all areas of NZ tax law including tax efficient business and investment structures, the establishment of managed funds and retail investment products, complex financing arrangements, tax disputes and tax policy issues.



### **Bart de Gouw, Deloitte, Auckland**

Bart is an Associate Director with Deloitte NZ. He provides specialised transfer pricing advice to clients in a wide range of industries. Bart leads projects for clients in all aspects of cross-border pricing arrangements. In particular, he has been involved in the negotiation of advance pricing agreements, providing planning and structuring advice, policy development, assistance with transfer pricing disputes, and compliance to a wide range of major multinational companies. Bart is a Chartered Accountant and has been a member of NZICA since 1994.



### **Craig Elliffe, Chapman Tripp, Auckland**

Craig is Professor of Taxation Law and Policy at the University of Auckland Business School. His areas of expertise include all areas of international taxation and double taxation agreements, funds management, GST issues, dispute resolution, restructuring and cross-border transactions including cross-border royalty and international income tax. Craig also acts as tax consultant at Chapman Tripp and was previously a tax partner at KPMG.

## SPEAKERS



### **Teresa Farac, Deloitte, Auckland**

Teresa is a tax specialist with 25 years experience assisting clients in mergers and acquisition, corporate structuring and international tax. She has significant experience in dealing with IRD investigations and disputes. Teresa has also been an active participant in tax reform and policy formulation. She was made a Fellow of the NZICA in 2001; and has been named as one of NZ's top tax advisers in the *International Tax Review*.



### **Patrick Goggin, Inland Revenue, Wellington**

Patrick is Group Manager, Assurance, IRD. The group consists of Investigations, Legal and Technical Services and Large Enterprises, and Customer Services. He is a member of a number of the Department's internal governance groups. Patrick chaired the IRD committee that worked with NZLS and NZICA on the Dispute Resolution Process.



### **Mike Hendriksen, Westpac, Auckland**

Mike is Head of Dispute Resolution at Westpac NZ. Before that he was a Senior Tax Counsel with the IRD's Legal and Technical Services where he was involved in complex tax investigations and disputes. He also participated as a facilitator in dispute conferences. Prior to joining the IRD, Mike was in private practice in NZ, Australia and England.



### **Bevan Miles, ASB, Auckland**

Bevan is the General Manager Taxation at ASB and manages the tax obligations of CBA's NZ Group. He has over 15 years specialist tax experience in corporate tax roles and professional services firms. Bevan's recent experience has focused on the financial services industry and his current role encompasses advising the business on all aspects of tax, managing implementation of new tax legislation, dispute management and tax risk management. Bevan is a member of the NZLS Tax Committee.



### **Robin Oliver, OLIVERSHAW Ltd, Wellington**

Robin is a Director in OLIVERSHAW Ltd and is on the Advisory Board of The NZ Tax Trading Company. He is an experienced tax practitioner with a reputation for bringing different perspectives and disciplines to issues. Robin was Deputy Commissioner IRD (1995 – 2011) and a member of the Executive Board. In 2009, he was appointed a member of the NZ Order of Merit and to the UN Committee of Experts on International Tax Co-operation, a position he still holds. Robin has been a member of the International Monetary Fund's expert group on taxation.

## SPEAKERS



### **John Payne, New Zealand Superannuation Fund, Auckland**

John is Head of Tax at the Guardians of NZ Superannuation. The Fund is subject to tax both in NZ and offshore. Prior to this he was Head of Tax at Vodafone NZ Ltd, provided consultancy services to Fonterra Co-operative Dairy Company and ASB Bank, had roles as Treasurer and Head of Tax at Carter Holt Harvey, Head of Tax at Brierley Investments, and as a Senior Tax Manager at Ernst & Young. John is also Convenor of the NZ Corporate Taxpayers Group.



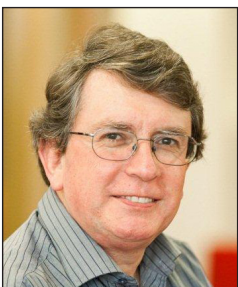
### **John Peterson, Minter Ellison Rudd Watts, Wellington**

John has practised tax law in New York and London and has been a tax partner at Minter Ellison Rudd Watts since 2008. He is a Commonwealth Scholar with a BCL in trusts and taxation from Oxford and an LLM in International Tax from NYU. John is on the editorial committee of *Taxation Today* and is currently writing *Partnership Taxation in New Zealand* (CCH, due for publication in 2012).



### **Casey Plunket, Chapman Tripp, Auckland**

Casey has extensive experience in the tax aspects of corporate acquisitions, mergers and restructurings, both on-shore and cross-border. He has advised US, UK and Australian investors on structuring their NZ direct investment; and has advised NZ and foreign institutions on cross-border structured finance transactions. More recently, Casey has participated in structuring managed and private equity funds, and in designing tax-effective investment products. He is a regular speaker at tax conferences; is convenor of the NZLS's Tax Committee; chair of the NZ branch of the International Fiscal Association (IFA) and a member of the Government's Rewrite Advisory Panel.



### **Martin Smith, Inland Revenue, Wellington**

Martin is the Chief Tax Counsel for the IRD. The Office of the Chief Tax Counsel contains the Taxpayer Rulings and Public Rulings Units, the Adjudication Unit, and the Escalations and Advising Unit. Martin joined the IRD in 1995.



### **Fred Ward, Russell McVeagh, Auckland**

Fred is an extremely experienced and highly regarded tax specialist. He is an expert in all tax matters, but his practice has a particular focus on corporate finance work, mergers and acquisitions and structured investment products. Fred has been a partner with Russell McVeagh since 1995.

## **SPEAKERS**



### **Sanjiv Weerasinghe, Inland Revenue, Wellington**

Sanjiv is Assurance Manager – Specialist Advice, IRD, and is one of IRD's senior operational lawyers. He is responsible for oversight of case management, conference facilitation, and for a team of transfer pricing and finance specialists. Sanjiv has extensive NZ and international private sector experience specialising in tax structuring of retail and private investment funds, VAT and international tax structuring. Since 2006, he has primarily concentrated on trusts, tax avoidance arrangements and cross-border transactions



### **Tony Wilkinson, Buddle Findlay, Auckland**

Tony is a partner in Buddle Findlay's national taxation team. He assists clients in tax disputes and also advises on the NZ income tax and GST consequences of a broad range of transactions. Tony regularly presents for both the NZLS and the NZICA.

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