

**HK TRUSTEES' ASSOCIATION LTD**  
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**SEMINAR ON**

**INTER-BENEFICIARY DISPUTES - WHAT TO DO WHEN YOU'RE CAUGHT  
IN THE MIDDLE**

Speakers: Ms Joanna Caen, Partner, Private Wealth Team, Herbert Smith Freehills

Date: Wednesday, 29 May 2019

Time: 5:30 p.m. – 6:30 p.m.

Venue: Herbert Smith Freehills, 23rd Floor, Gloucester Tower, 15 Queen's Road Central, Hong Kong

Accreditations: One CPD point for HKTA Certified Trust Practitioner

**The speakers:**

Ms Joanna Caen is a Partner in the private wealth team at Herbert Smith Freehills, or is in fact their Head of Private Wealth – China. Joanna is admitted as a solicitor of the High Court of Hong Kong and as a barrister and solicitor of the High Court of New Zealand. Joanna has spent her entire career in the private wealth space. She advises clients from across the private wealth sphere (including individuals, private banks, trustee companies and other fiduciaries and advisers) on various private wealth issues. Her particular specialisms are trusts, estates, family companies, charities and, increasingly, mental capacity issues. She provides both non-contentious and contentious advice.

**The talk will cover:**

1. Beddoe applications – What they are, when they are useful and practical considerations when applying.
2. Disclosure/discovery of documents as a non-party or neutral party –
  - a. Trustee's duty of confidentiality;
  - b. responding to non-party discovery applications;
  - c. Schmidt v Rosewood Trust disclosure applications
3. Costs – Entitlement to indemnity to costs for third-party litigation by beneficiaries, relevance of Beddoe applications and provisions in the trust deed

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The cost per person will be HK\$400 for members of the HK Trustees' Association Ltd, and HK\$450 for non-members.

Please complete this form and return to us at the above address with your cheque made payable to "**HK TRUSTEES' ASSOCIATION LTD**".

Alternatively, please deposit to our account no. 447-0-024582-3 with Standard Chartered Bank and send us the receipt with this form by email.

Name of Member/Company \_\_\_\_\_

Name(s) of attendee(s) \_\_\_\_\_

Cheque total: \_\_\_\_\_ Cheque No. \_\_\_\_\_

Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_

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(NB: Payments are non-refundable unless the event is cancelled by the Association. Bookings are only confirmed with payment, on a first-come, first-served basis.)