

SEMINAR ON

DISGRUNTLED BENEFICIARIES – WHAT TO DO WHEN YOU'RE SUED

- Speaker : Ms Joanna Caen, Partner, Private Wealth Team, Herbert Smith Freehills
- Date : Tuesday, 11 June 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
- CPD : One Point for HKTA Certified Trust Practitioner™

The speaker:

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:

- a. Privilege – Legal advice privilege: what is it and when can it be claimed against beneficiaries?
- b. Costs – When is a trustee entitled to reimbursement or indemnity from the trust fund?
 - i. Relevance of the nature of the claims – trustee acting as an ordinary litigant vs acting a party to a "third-party dispute";
 - ii. express provision in the trust deed and other protection Trustees may seek
- c. Applications – Applications for directions in the context of hostile beneficiary litigation
- d. Conflicts of interest – Conflicts of interest between roles as beneficiary/settlor/protector/trustee/director of PTC, etc.



香港信託人公會
Hong Kong Trustees' Association

SEMINAR ENROLLMENT FORM

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Seminar Fee : HK\$400 (member); HK\$450 (non- member)
CPD : One Point for HKTA Certified Trust Practitioner™

Name of Company _____

Name(s) of attendee(s) _____

Contact Person: _____ Phone: _____

Email: _____ (for sending out confirmation)

Payment and method (please tick as appropriate)

HK\$400 (member) x _____ Person = HK\$ _____

HK\$450 (non-member) x _____ Person = HK\$ _____

Cheque payment [made payable to “**HK TRUSTEES' ASSOCIATION LTD**” is attached and send to **HKTA Room 1103, 11/F., V Heun Building, 138 Queen's Road Central, HK**

By bank transfer [**Standard Chartered Bank A/C No.: 447-0-024582-3**]. Please email the bank receipt (put indicate your full name on it) to **irislau@hktrustees.com**

e-Receipt will be issued to company unless otherwise stated: _____

e-Attendance certificate [participants must sign in and out at the seminar]

Note:

1. Post-dated cheque will NOT be accepted.
2. Payment are non-refundable unless the event is cancelled by the Association.
3. Seat reservation is on first-come first-served basis with payment.
4. e-Attendance certificate will be issued within 10 working days after the completion of the seminar.