
Planning for the future
“YOU ARE IN SAFE HANDS...
it is never too late (or early) to start putting a plan in place for your succession...”
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Queenstown
Wanaka
TODD & WALKER law
LAWYERS | NOTARY PUBLIC
Level 2, Craigs Investment Partners House
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SUCCESSION

Whether it is your business or personal life it is never too late (or early) to start putting in place a plan for your succession and how you wish your affairs to be handled on your death. It is our experience that these significant life changes are not always planned with the precision they deserve. Often it is the little things that are overlooked.

To illustrate, here at TODD & WALKER Law, Principal Graeme Todd is approaching the milestone of 40 years as a practising lawyer in the Queenstown Lakes District. Over these years Graeme has built up a significant client base, and with Graeme being in his early 60's, as a firm we need to start thinking through what his succession sometime later in this decade might look like for himself, his family, the firm, and most importantly our clients, to ensure they are taken care of in the future.

While Graeme has no plans to retire any time soon, we want to make sure that planning for his succession isn't an overnight process. Given Graeme's age and stage in life, it is critical for the continued success of the firm that we start the conversation with our clients now, in order to put in place strategies to ensure that his eventual transition into retirement is as seamless as possible. We need to ensure our clients develop meaningful relationships with other leaders at the firm in order to best serve our clients now and into the future.

Part of the recent growth in our firm, especially at a senior level, is a direct result of this planning. We have identified and recruited a team of experienced and well-rounded lawyers, who will in the decade ahead become the future heads of the firm, and be the trusted advisors to our clients. During that period we will be consulting with each of Graeme's clients to identify who within our team will be the best fit for them, in terms of their future relationship with us.

Whilst this planning has been going on, Graeme and his wife Jane have been reviewing the relationship and estate planning they did when they got together 15 years ago, and re-addressing the complicated issues that arise with blended families. Not only do you have to try to provide for whoever is the survivor, but at the same time you must ensure what each partner brought to the relationship is preserved for that persons children and/or grandchildren.

We are sure there are a number of our clients that are starting to think about the same sorts of issues that Graeme has been addressing. We are equally confident that there will be many more that need to ensure their existing estate and trust documents reflect their current wishes.

There may also be clients who have been wondering who will be the lawyer that handles their affairs when Graeme retires, and we are genuinely committed to ensuring this is a smooth process that ensures a relationship of trust and confidence into the future.

If you would like to have a no obligation chat with Graeme about any of the issues mentioned in this document, give him a call or drop him a note to set up a time to discuss your affairs. The Senior Leadership Group of the firm have asked Graeme to spend one day each week out of the office meeting with clients to discuss these important topics, and introduce them to other members of our team. These initial chats can be over a coffee, at your home or place of business, or even on the golf course. So please feel free to make contact.

We wish to reiterate that this is not a process of Graeme hanging up the boots any time soon, but instead a gradual planned transition to ensure our valued clients are looked after now and into the future.

MEET THE SENIOR LEADERSHIP GROUP BEHIND TODD&WALKER law

LAWYERS | NOTARY PUBLIC

Gemma Beckman-Cross **Associate**	Andrea Gilbert **Associate**	Louise Denton **Senior Associate**	Michael Walker **Principal**	Graeme Todd **Principal**	Peter Sygrove **Senior Associate**	Pip Roberts **Senior Associate**	Ben King **Associate**

Supported by a further team of 10 staff with legal qualifications and a strong support team

Phone (03) 441 2743 | **Web** www.toddandwalker.com

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