



CASE STUDY

Harnessing CCH Learning Professional Insights for New Zealand's Trustees

Solution

With the recent reforms to trust laws in New Zealand, it has never been more critical to understand the roles and responsibilities of a Trustee. Vastly increased regulatory requirements bring with them a new level of disclosure and trust obligations. On the increase are trust disputes with more cases than ever ending up in court.

Responsible for several trusts in New Zealand, Mihiteria King believes it is vital Trustees stay up to date with any updates in trust law and further validate the actions they undertake daily in their role.

Acknowledging recent watershed changes for New Zealand trusts saw Mihiteria search for a solution that could provide the training and insights on navigating through any updates – in an easy to use and understand solution.

“After borrowing a book on trust precedents from my library, I realised there had to be a better way – a more efficient way – to stay up to date with what would happen in 2020. That’s when I came across CCH Learning online, and I realised the educational webinars on trust changes were exactly what I needed. It really was a game-changer for me,” said Mihiteria.

Choice and value lead to success

For Mihiteria, it has been the comprehensive range of topics from experts in their field that has delivered significant benefits. Having the sole trader discount applied to her account delivered a better return on her investment as well.

She noted: “I wasn’t sure if the sole trader discount applied to me and was delighted to find out in a call that it did. The support and customer service I received to log on and navigate through the administration and course selection was outstanding.”



Company Profile

Name: Mihiteria King, Trustee

Region: New Zealand

Operation: Trustee Services

Products: CCH Learning



Challenge

Stay up to date with significant changes in trust law and access trust precedents 24/7 to better prepare for a fiduciary trustee role.



Product Solution

✓ CCH® Learning

CCH Learning gives professionals the edge to keep on top of industry trending topics, regulations and more.



CASE STUDY: Mihiteria King, Trustee

A comprehensive range of topics

“Since September 2019, I have attended several webinars around trusts, litigation, tax updates and understanding how regulator changes will be applied in real life. Having access to expert insights and precedents means it takes any potential for misinterpretation out of my role of a trustee. I seek certainty and accuracy in all that I do, and I take my role of Trustee very seriously. Best practice is always what I aim for,” she outlined.

To date, Mihiteria has completed multiple webinars within the Trust Series 2019, Trust Series 2020, 2020 Tax Update, Practical Trusteeship 2020, Death of a Taxpayer 2019 and Recent Trust Cases 2018.

“The range of topics and speakers with CCH Learning is spot on. The Trust Expert, Vicki Ammundsen, is clear, concise and is easy to follow when she presents. It’s clear that she is a known expert in her field. References in presentation handouts are a five star model of what you want. Economical to print out in advance if you want that additional support, with plenty of on-screen commentary in plain language.”

CCH Learning webinars also provide additional workbooks for webinars, delivering deep and thorough practice professional advice.

“A CCH Learning Trustee Series webinar provided a supporting workbook with 23 pages. It was very thorough and being able to come back to this whenever I need to give me a level of professional confidence I really appreciate,” she said.

Being able to access professional information in a timely fashion is one reason why Mihiteria is a fan of CCH Learning. For her, the ‘intuitive’ way you can access up to date and accurate information is both inspirational and reassuring.

“There is an abundance of information in CCH Learning that I didn’t know before. Every webinar is always informative, and if I need to fill in any gaps, I can simply go to the workbooks and CCH textbooks. They are just brilliant.”

Mihiteria benefits from the regular webinar email communications. New sessions focus on change in existing legislation and precedents – giving her the heads up there is more to stay up to date with.

“It’s not very often you understand the main topic and detailed supporting topics in an educational webinar from an email alone, however, with CCH Learning that is exactly what you get. I know what they are covering ahead of time, and I am not wasting my time or money with my subscriptions. I really value this service,” she commented.

The value of professional development

In terms of value, the flexibility of being able to listen on-demand or read and follow up on webinar notes whenever Mihiteria can is extremely valuable. Material and handouts are provided for every webinar, and this fits in with her very busy schedule.

“I am quite a busy person, and CCH Learning lets me sit down at a time that is convenient for me, and this is a huge benefit. It means I don’t have to re-allocate time from my administrative duties and the professional outcome of being across up to date changes is significant.”

She concluded: “In terms of the trusts I administer, I believe the beneficiaries are benefiting from me having access to professional resources from renowned experts. I feel more confident and competent in my role, and I know I am doing the right thing by the beneficiaries. At the end of the day, I know I have done my best, and it certainly helps me sleep at night.”

CCH Learning delivers specially designed webinars for professionals and businesses searching for easy and cost-effective access to a wide range of topics including Tax & Accounting, Legal, Trusts & Estates, Business & Commercial, HR & Employment as well as IT and Professional skills. Through our wide and varied programme, we provide professionals with the knowledge and skills to improve efficiency, develop best practice, stay in touch with their changing professional obligations and help them to succeed in the competitive business environment.