



E·智·论·坛
E-WISDOM FORUM



E智论坛之房兴未艾

与专家面对面轻松谈房说财经



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E·智·论·坛
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论坛流程 RUNDOWN

1

主办方致辞

2

**税局调查介绍以及住宅买卖
的明线规则**

3

2018新西兰宏观经济走势

4

解读奥克兰统一规划

5

Q & A

6

小讲座 & 展位开放



特别鸣谢

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主办方介绍



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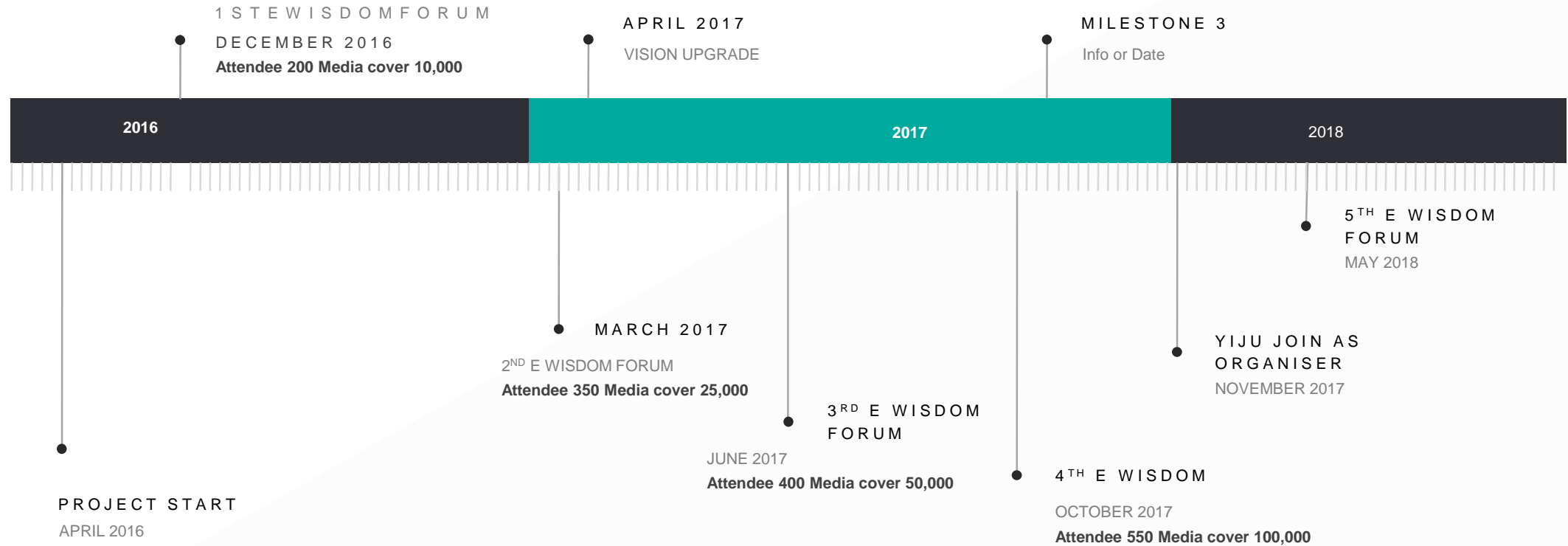
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01

主办方致辞

WELCOME SPEECH

MILESTONE



OUR TOPICS

REAL ESTATE



INVESTMENT

PROFESSIONAL
SERVICE



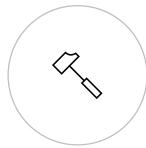
ENTERPRENUERSHIP

PATICIPANTS



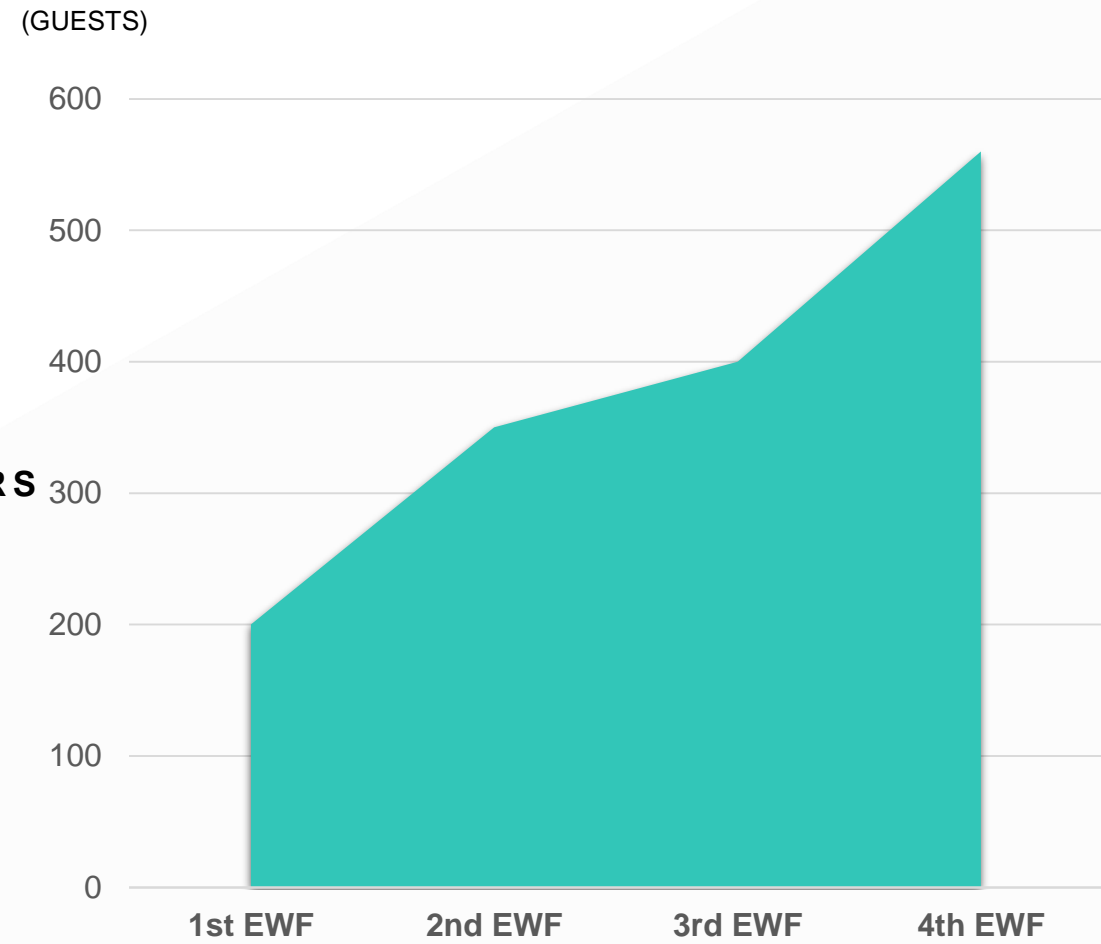
RSVP

The number of audience attending E Wisdom Forum increased from 250 to 550 during the 4 forums.

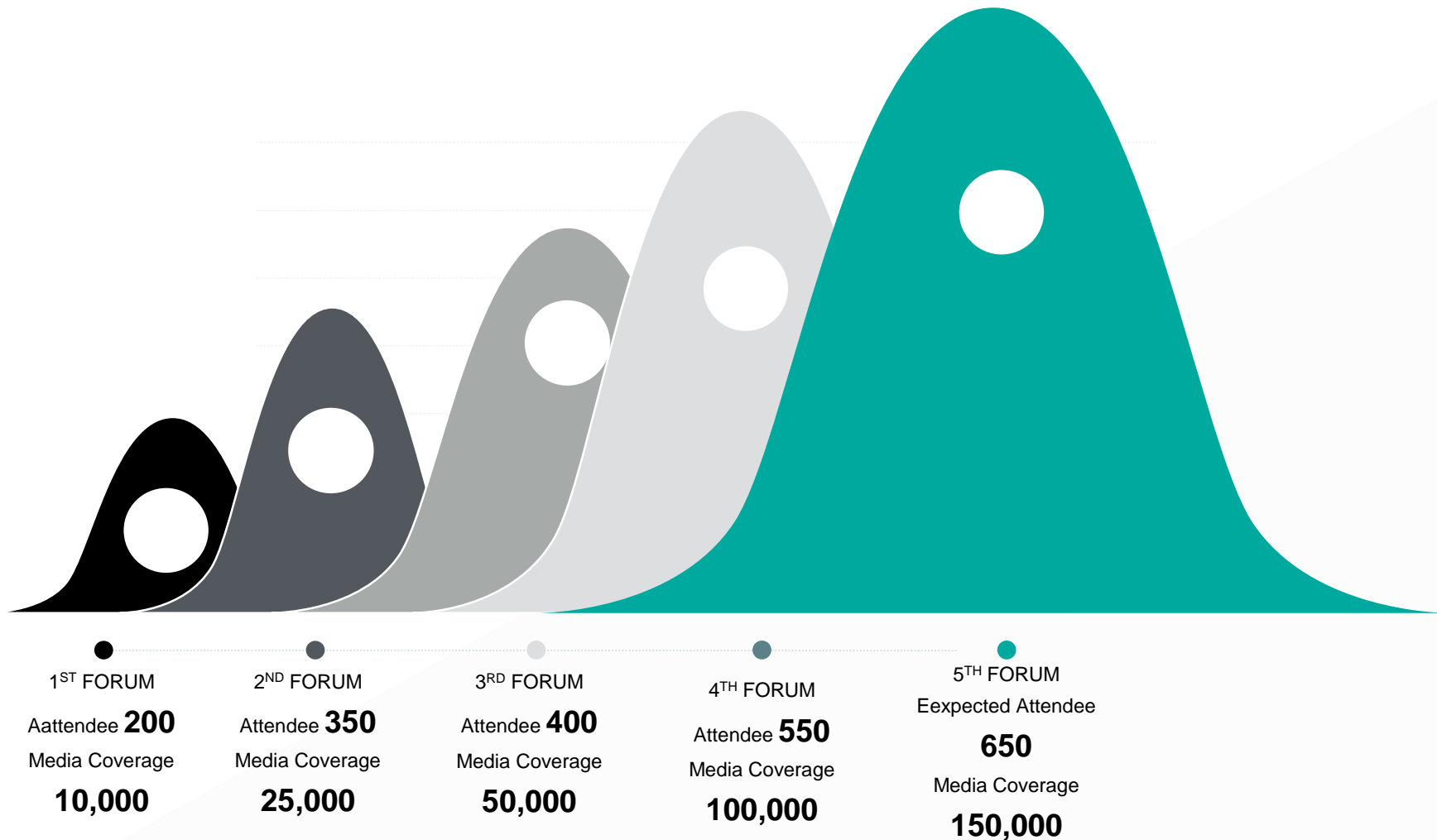


SPONSORS & SPEAKERS

The number of sponsors surpass 40 and the number of speakers reaches to 20.



ATTENDEE INCREASEMENT & MEDIA COVERAGE



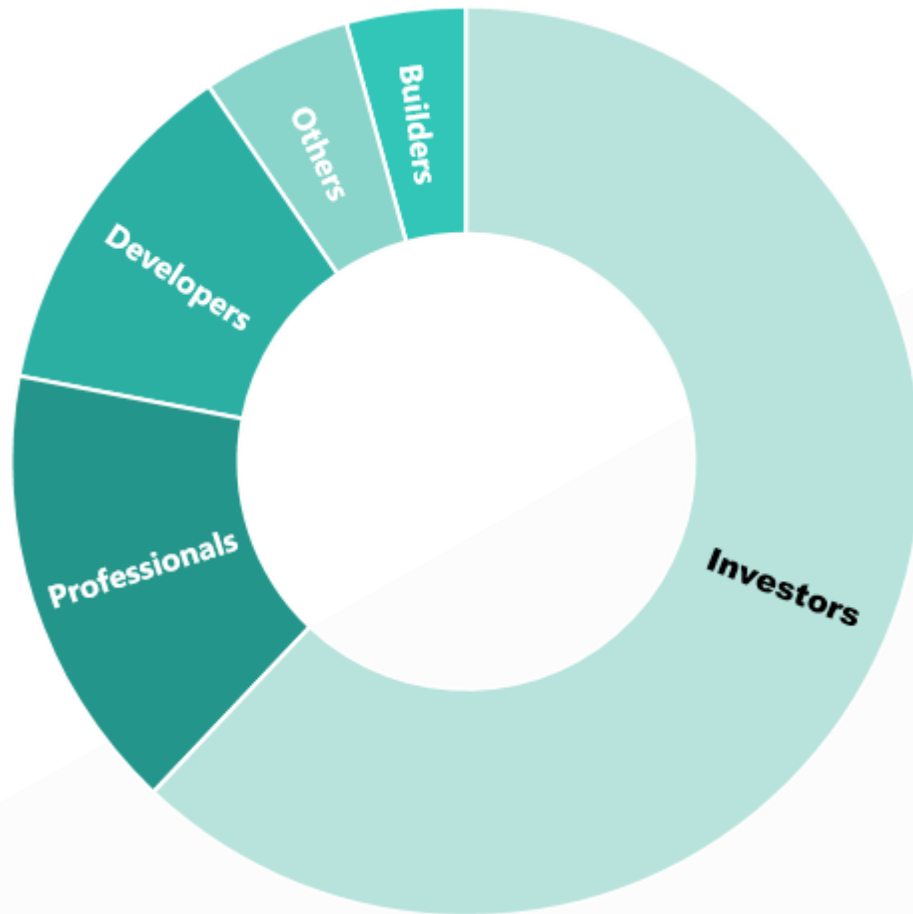
ATTENDEE BOOST

The number of attendee increase significantly, from 200 to 550 in last 1 year.

MEDIA COVERAGE

We have banded the most powerful Chinese media in Auckland SKYKIWI + YIJU NEW ZEALAND + HOU GARDEN as an alliance to empower E wisdom among the market.

FORUM ATTENDEE DISTRIBUTION



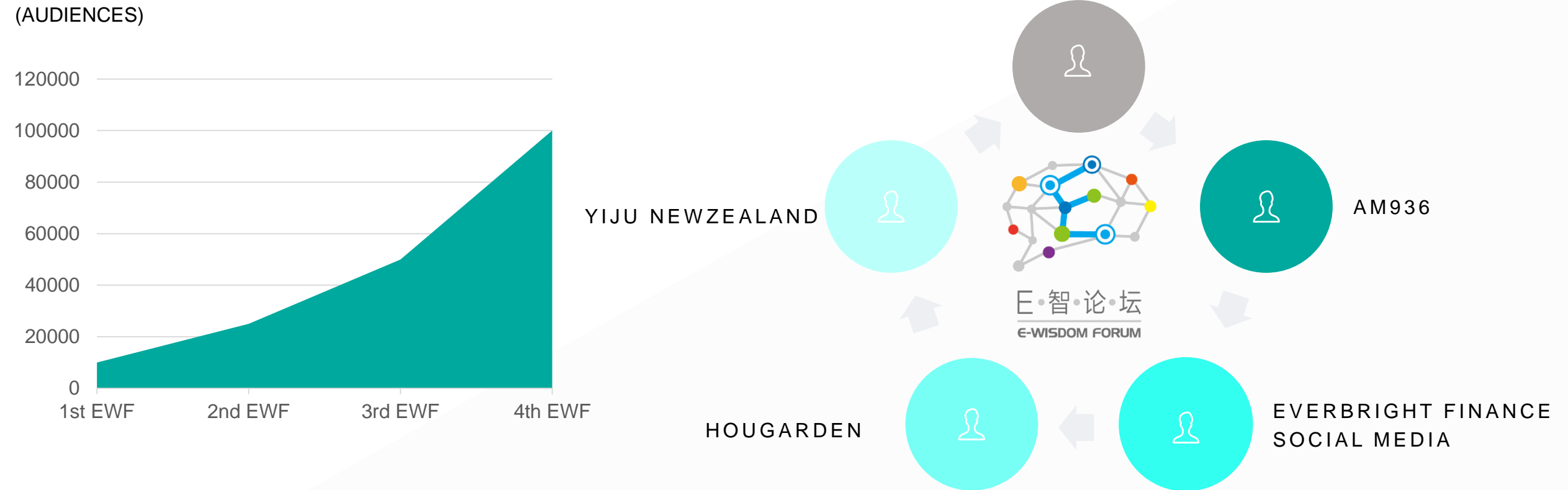
INVESTORS

As a New Zealand's leading independent real estate investing Network, Information Platform and Education Space, E wisdom Forum continues to attract investor interest.

HIGH-END CLIENTS

Our Forum provides a platform between speakers and audiences , breaking through the reticence and reserve of listeners, encouraging them to engage with the speaker and play a part in the proceedings. It also generate high quality clients for us such as professionals, developers and builders.

MEDIA COVERAGE



THE WAY WE COMMUNICATE WITH YOU

As the largest Chinese Forum of New Zealand, we have kinds of ways to make contact with our customers and we devoted to delivering the most authoritative information and the most professional business image in this industry.



FACE TO FACE

- Presentation
- Q & A
- Workshops
- Booths
- Expo

SOCIAL MEDIA

- Facebook
- Wechat
- Weibo
- Youtube
- Linkin



ONLINE

Our Website

<http://www.ewisdom.co.nz/>



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E-WISDOM FORUM

02

税局调查介绍以及住宅买卖的明线规则

Overview of Inland Revenue Activities and the Bright-line Test for Residential Land



演讲嘉宾

Deloitte.



Cindy Dong

德勤新西兰高级税务咨询师

德勤新西兰中国服务部是德勤全球中国服务部的成员之一。德勤新西兰中国服务部拥有在新西兰和中国都有工作经验的专业商业和税务咨询人员。

将从会计师的角度，深度解读五年版的“明线测试”，教你如何应对税务审计，建立保护资产的坚强堡垒。

Overview of Inland Revenue Activities and the Bright-line Test for Residential Land

税局调查介绍以及住宅买卖的明线规则

德勤中国服务部 Deloitte China Services Group

专门组建的德勤新西兰中国服务部拥有审计、税务、管理咨询和财务咨询等部门的讲中文的专业人士

A China focused team with Mandarin and Cantonese speaking professionals across tax, accounting and advisory, audit, consulting and corporate finance with cross border working experience.

我们的服务包括 What we do

- ✓ **向中国投资者提供税务、会计和审计等常规财税服务**

Provide tax, accounting advisory and audit services to Chinese clients with investments in New Zealand

德勤中国服务部 Deloitte China Services Group

我们的服务包括 - What we do

- ✓ **帮助新西兰企业在华投资**
Assist NZ businesses in relation to investment and expansion in China
- ✓ **提供财务，税务尽职调查服务**
Provide financial, tax, and commercial due diligence services
- ✓ **并购后的整合支持**
Manage post-merger integration process
- ✓ **德勤私人服务**
Support mid-market businesses via our Deloitte Private team
- ✓ **提供税务纠纷协助，以及一系列相关的税务审计服务**
Assist with tax disputes and rulings offering including tax support on a wide range of interactions with the Inland Revenue

今日议题 Agenda

税务局动向 IRD activities

- **税务审计概述**
Audit Activities in a nut shell
- **税务审计选择 – “为什么选我”**
Audit Selection - “Why me”
- **不断扩展的税务局信息来源**
The ever expanding IRD sources of information
- **处理税务审计**
Handling an IRD audit
- **税务局近期的合规审查重点**
IRD's recent compliance focus

住宅用地明亮线规则 Bright-line test for residential land

- **什么是明亮线规则**
What is bright-line test
- **延长明亮线测试时间**
Extension of the bright-line test

税务局动向

IRD Activities

税务局动向 IRD Activities

税务审计活动 Audit Activities

概述

In a nutshell

税务局对于您的财务事宜审查

Examination of your financial affairs by Inland Revenue

主要目的是检查您是否遵守税务并支付了正确的税款

Main purpose is to check whether you have been complying with the NZ tax laws and have paid the correct amount of tax

审计范围，使用的方法和措施会有所不同

The scope of audit reviews and the techniques and measures used could vary

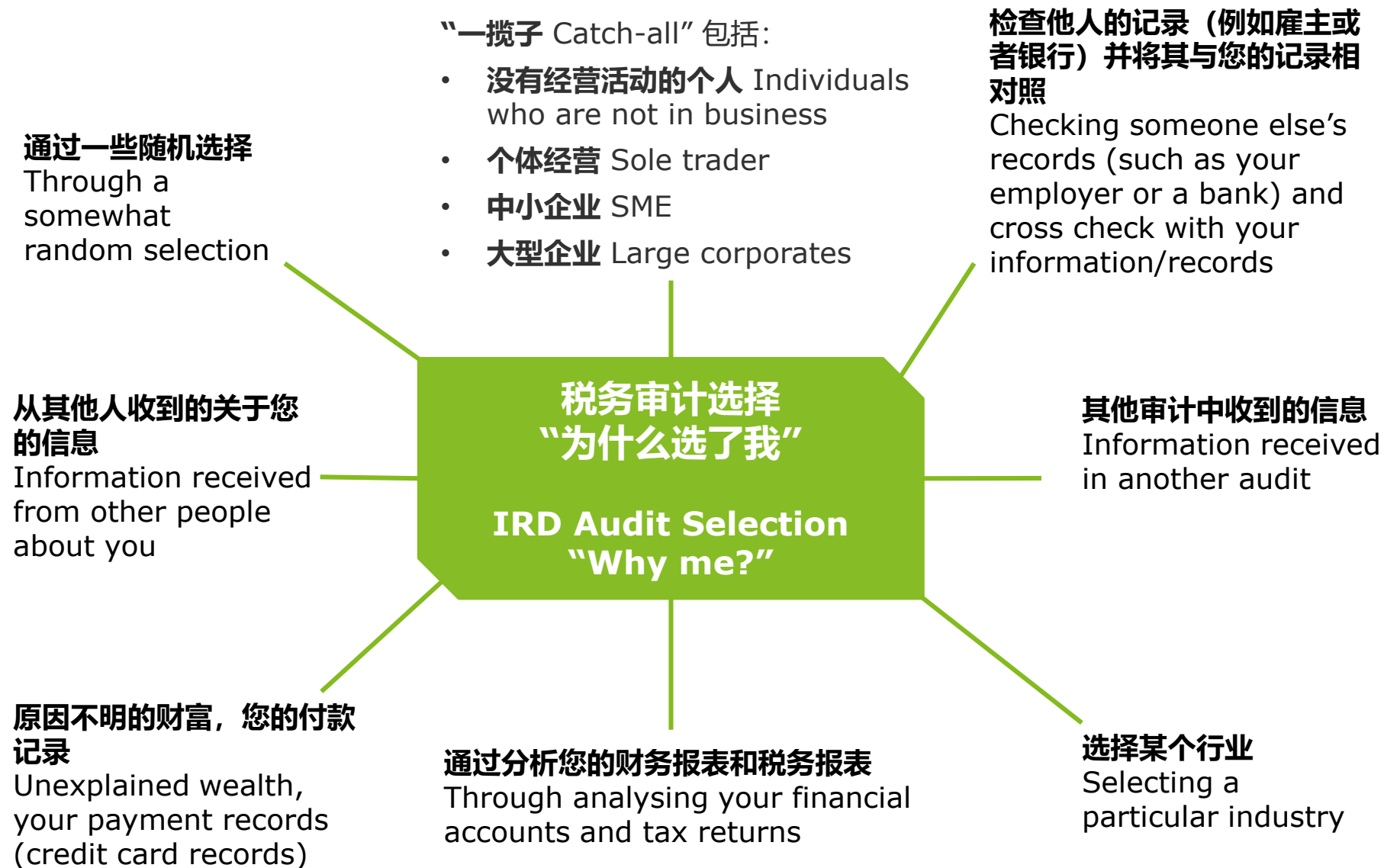
简单的可能是检查GST的注册或者数据核对

Simply checking for GST registration & reconciliation

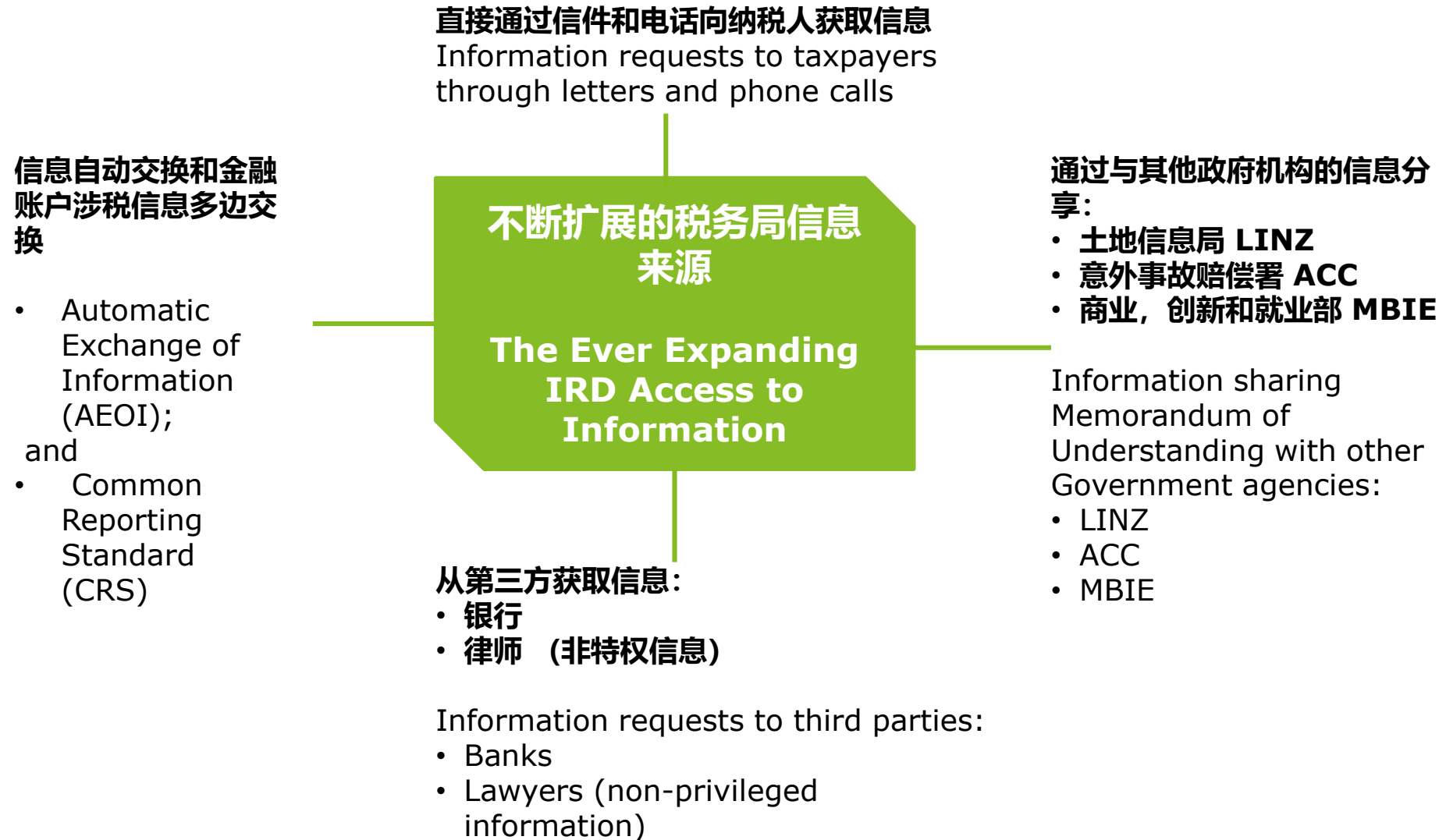
或者全面检查商业和个人记录

Or full examination of business and personal records

税务局动向 IRD Activities



税务局动向 IRD Activities



税务局动向 IRD Activities

税务申报 Assessment

- 纳税人自我申报
Self-assessment by taxpayer
- 纳税人未采取自我申报
No self-assessed position taken by taxpayer
- 税务局评估
Assessment by IRD

风险管理 Managing the Risk

- 要求修改自我申报（根据税法第113条例）
Request to amend assessment - Section 113 adjustments
- 自愿披露 – “坦白错误”并减少差额罚款
Voluntary disclosures – “come clean” and reduction of shortfall penalty
- 从税务局寻求指示性看法或获取有约束力的意见
Seek indicative view from IRD or obtain binding rulings

税务局活动 IRD Activities

- 查询
Queries
- 风险评估
Risk review
- 通过正式审计通知的税务审计（信件，访问）
Audits through formal Notification of Audit (letters, visits)
- 间接税审计（GST，福利税）
Indirect tax reviews such as GST refund checks and FBT reviews
- 针对曾被审计过的纳税人的合规审查
Compliance review
- 税务纠纷程序
Disputes process

税务局动向 IRD Activities

处理税务审计 – 在进入正式审计之前需解决问题

Dealing with IRD - Stop getting to Audit stage

我们推荐这些重要步骤

**We recommend
these important
actions**

在任何审计交涉中尽早联系您的税务顾问

Involve your tax advisor early on in any audit interactions

在向税务局提供任何回复信息前，请让您的税务顾问审核所有答复

Have your tax advisor review all responses before providing them to IRD

如果发生错误，请自愿向调查员披露，以减少处罚并表明愿意更正的态度。自愿披露的时间点会对处罚程度有重要影响。

If an error has occurred, make voluntary disclose to the investigator to reduce penalties and show your willingness to do the right thing, especially when the timing of disclosure can have significant impact on any shortfall penalties imposed

为获取税务确定性，可申请指向性意见（无约束力）或者获取具约束力的税务局意见

To get certainty on tax positions, apply for an indicative view (non-binding) or a binding ruling (binding)

德勤可以解决处理上述所有问题

Deloitte can assist with all of the above

税务局动向 IRD Activities

处理税务审计 – 您需要知道

Dealing with IRD – Know what to expect in an audit

即使是纳税事宜管理良好的公司，收到税务局的审查信函也会有很大的压力

It can create a lot of stress to receive an IRD review letter, even in business whose tax affairs are well managed

处理审计的首要关键是了解审查可能的内容以及如何更轻松的应对整个审计过程

The best way to go through an audit is knowing what to expect and how to make the experience easier

调查人员有一定的审计绩效目标

Investigators have certain audit performance targets

税务局的所有调查人员近年来一直在接受“警察调查性问询”培训

All IRD investigators have been undergoing police investigative interviewing training in recent years

税务局动向 IRD Activities

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税务局开始利用业务转型（Business Transformation）和升级后的电脑信息系统，这使得其审计活动正在变得更加复杂

IRD is becoming more sophisticated than ever with the Business Transformation project and the upgraded computer system

如果处理方式不当，税务审计可能会持续很长一段时间，甚至影响企业正常运转

Without careful management, tax audit can last for extended period of time and cause potential disruption of business

税务局动向 IRD Activities

处理税务审计 – 德勤为您提供协助

Dealing with IRD - how Deloitte can help

德勤经验丰富的专家可以提供以下帮助：
Our experienced specialists can help with:

协助您处理税务局的风险调查和税务审计，以及协调税务局信息调查取证

Assist with IRD risk reviews, investigations and audit, coordinate forensic support for information requests

管理整个税务纠纷流程，包括协调谈判

Manage the entire tax dispute process, including settlement negotiations

寻求税务局指向性意见或有约束力的裁断，在税务结果不符合税务政策的情况下与税务局积极沟通

Seek indicative views or binding rulings from IRD; liaise with IRD where tax outcomes do not resonate from a tax policy perspective

税务局动向 IRD Activities

税务局近期的合规审查重点 IRD's recent compliance focus

税务局每一年发布年度报告，概述其绩效目标，结果和战略方向。以下为自2015至2017年的持续重点区域：

Every year IRD releases its Annual Report outlining their performance targets, results and strategic intentions. In recent years (2015 – 2017), these have always been the “hot” areas

地产交易

Property transactions

- **仅在2017年就重新评估约1.17亿纽币的税款，与2016年相比增长了69%**
\$117 million of additional tax have been reassessed in 2017 alone, representing a 69% increase compared with 2016
- **与新西兰土地信息局（LINZ）的信息交换**
Exchange of information with Land Information NZ

雇主代缴税

Employer deductions
(PAYE, KiwiSaver, etc)

- **重点针对服务行业**
Main focus on the hospitality industry
- **2017年期间访问了300家企业，并检查了他们的记录**
300 businesses were visited during 2017, with their records checked

税务局动向 IRD Activities

税务局近期的合规审查重点 IRD's recent compliance focus

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隐藏经济 Hidden economy	<ul style="list-style-type: none">• 2017年的调查产生了约1.59亿纽币的税收差异 2017 investigations resulted in tax position differences of \$159 million• 增加了针对建筑行业的税务合规宣传活动 Increased campaign activities in the building industry
激进的税务筹划 Aggressive tax planning	<ul style="list-style-type: none">• 2017年的调查产生了约4.62亿纽币的税务差异 2017 investigations resulted in tax position differences of \$462 million• 重点针对大型企业 Main focus on “significant enterprises”

Our people – Deloitte Tax Disputes and Rulings

德勤新西兰 处理税务纠纷的专家



Campbell Rose
Partner - Tax



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I work alongside clients to execute transactions smoothly, achieve valuable certainty through binding rulings, and resolve tax disputes - using my technical and strategic expertise. This involves helping clients to manage risk, so I draw from my significant legal experience and broad industry exposure to achieve this by providing pragmatic, commercial and outcome-oriented advice. I enjoy delivering lasting solutions for my clients' tax issues, so they can focus on what they're passionate about – running a successful business.



Virag Singh
Director - Tax



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In a continually evolving and ever more challenging New Zealand tax landscape, I am passionate about my role as a Tax Director and leading the Deloitte Tax Disputes & Rulings Centre of Excellence. I gain huge satisfaction from assisting our clients and Deloitte client service teams to strategically navigate through complex and costly tax disputes. I also enjoy supporting clients to work successfully with regulators to achieve certainty on their tax positions.

Our people – Deloitte China Services Group

德勤新西兰中国服务组



Jenny Liu
Partner - Tax

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Leading the Deloitte New Zealand China Services Group has been both challenging and exciting. Our team of Chinese speaking professionals play a key role in assisting both inbound and outbound investments between New Zealand and China. We are proud to have contributed to many successful cross-border investments as a result. My experience with both Deloitte New Zealand and Deloitte China enables me to bridge the tax and accounting differences between the two firms, and allows me to pro-actively manage tax and financial planning for overseas investments.



Cindy Dong
Senior Consultant - Tax

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I am a Senior Consultant in our China Services Group. I have assisted clients in their investment plans and setting up investment entities in New Zealand.

I previously worked for the New Zealand Inland Revenue Department for more than 5 years. During those years, I have conducted tax compliance reviews of different corporate and non-corporate entities.

I am a chartered accountant of New Zealand and holds a Master of Taxation (Honours) degree. I am fluent in Mandarin and English.

五年内买卖住宅的明亮线规则

**Extension of the bright-line
test to five years**

明亮线规则 The bright-line test

回顾 To recap

- **政府推出的明亮线规则从2015年10月1日起生效**
From 1 October 2015, the “bright-line” test came into effect
- **补充了现行土地税收规则中的“意图测试” – 明确的客观标准**
The purpose is to supplement the “intention test” – unambiguous objective test
- **如在两年内买卖住宅物业，资本获利要征税**
Capital gains tax on residential properties purchased and sold within 2 years can be taxable

明亮线规则 – 延长测试区间

Extension of the bright-line test

- **2018年2月15日，政府宣布延长明亮线规则的测试区间**

On 15 February 2018, the Government announced the extension of bright-line test

- **该规则的测试期限由两年延长至五年，针对2018年3月29日或之后购买的住宅物业**

The period under the test extended from two years to five years, applicable for residential properties ***purchased*** on or after 29 March 2018

明亮线规则 The bright-line test

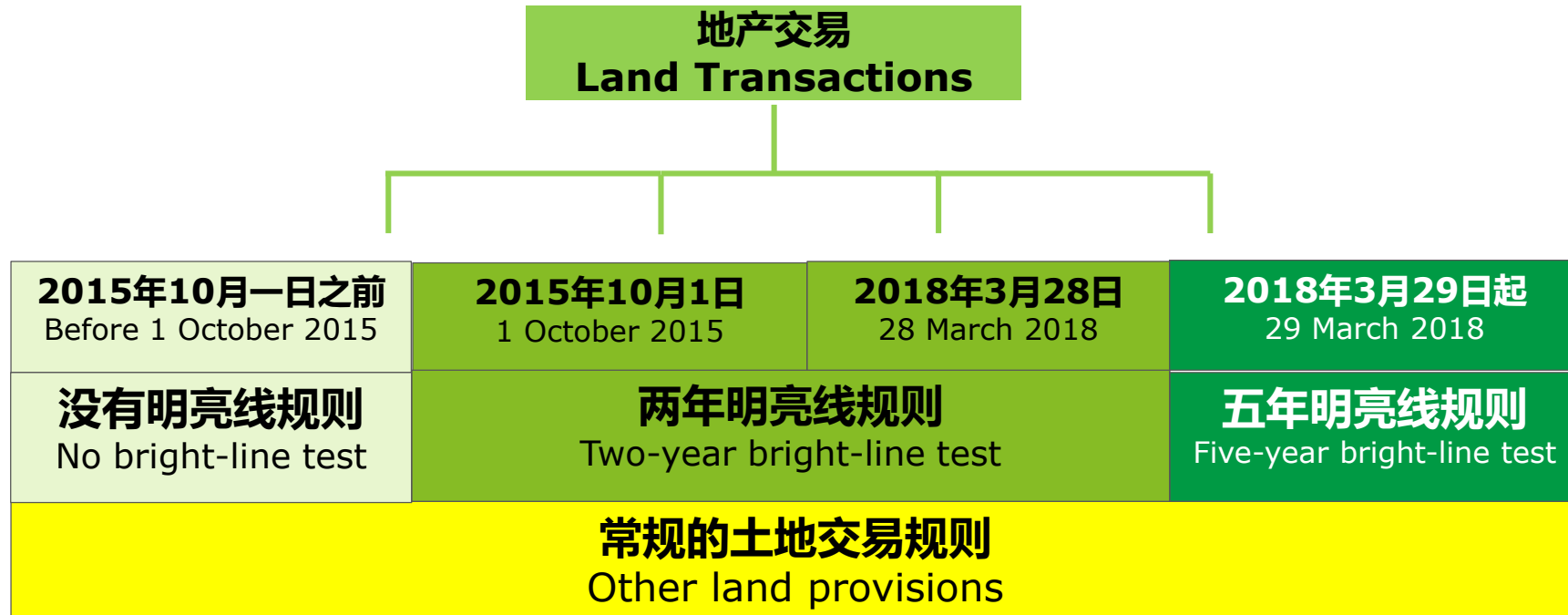
实际上有什么改变? What has actually changed?

- 不是很多

Not a whole lot

- 具体操作与自**2015**年以来推出的规则完全相同，除了测试区间延长至五年

The operation of the bright-line test will be exactly the same as it has been since the introduction in 2015, except for the fact that the test will now cover 5 years



明亮线规则 The bright-line test

五年窗 Five-year window



- **税务局将依靠新西兰土地资料系统来识别和调查高风险的物业买卖**
IRD will rely on LINZ system to identify and investigate high risk property sales
- **在买卖房产的情况下，五年窗将从土地局注册购买日开始直至卖房产购买合约日期**
The date of acquisition is the date that title is registered for the purchase, and the date of disposal is the date that a person enters into a contract to sell the property.
- **对于分割的土地，购买日期为原未分割土地的购买日期**
For subdivided land, the date of acquisition is the original date of acquisition of the undivided land

明亮线规则 The bright-line test

住宅用地的定义 Residential land - Definition



住宅用地 – 例外 Residential land - Exceptions

例外 Exceptions

自住住宅例外 - Main home exception

- 土地上有一个住宅; 以及
Land has a dwelling on it; and
- 住宅主要作为业主的住所; 以及
Dwelling is occupied mainly as a residence of the owner; and
- 住宅为业主的主要住宅。
Dwelling is the main home of the owner.

家庭基金 -Trust

- 为基金受益人的主要住所
Main residence and main home of a beneficiary of the trust
- 若设立人的住宅不由基金拥有或者设立人的住宅由另外一个基金拥有, 则不适用
N/A where settlor has a main home not owned by trust or settlor is beneficiary of another trust that owns the main home of settlor

实际使用测试”而不是“意图测试”

“Actual use test” rather than “intention test”

住宅用地 – 例外 Residential land - Exceptions

分割土地 – Subdivided land

如分割土地，自住的免税条例只用於有自住住宅的地块

If subdivided land, main residence exception applies to the lot of land with the dwelling of main residence.

例外 Exceptions

其他例外情况 - Further exceptions

- **继承房产**

Inherited property

- **关系房产 - 除非在从原购买日期起2年内卖掉住宅而且不是自住住宅**

Relationship property – Unless subsequent sale of property within 2 years of original acquisition and not transferee's main home

明亮线规则 The bright-line test

税务抵扣 Deductions Allowed

房产最初收购价

Initial acquisition price of property

关于收购支出例如费律师，评估师，测量师和房地产经纪 人费用

Expenditure related to the acquisition e.g. costs of lawyers, valuers, surveyors and real estate agents

卖房产的支出

Incidental cost of disposing the property acquisition, e.g. renovation

资本改建加建支出

Capital improvements made on the property after acquisition, e.g. renovation

明亮线规则 The bright-line test



明亮线规则 The bright-line test

具体反避税规则，以防设立公司或基金规避的相关规定

Specific anti-avoidance rules for land rich companies and trusts

其他 Other Matters

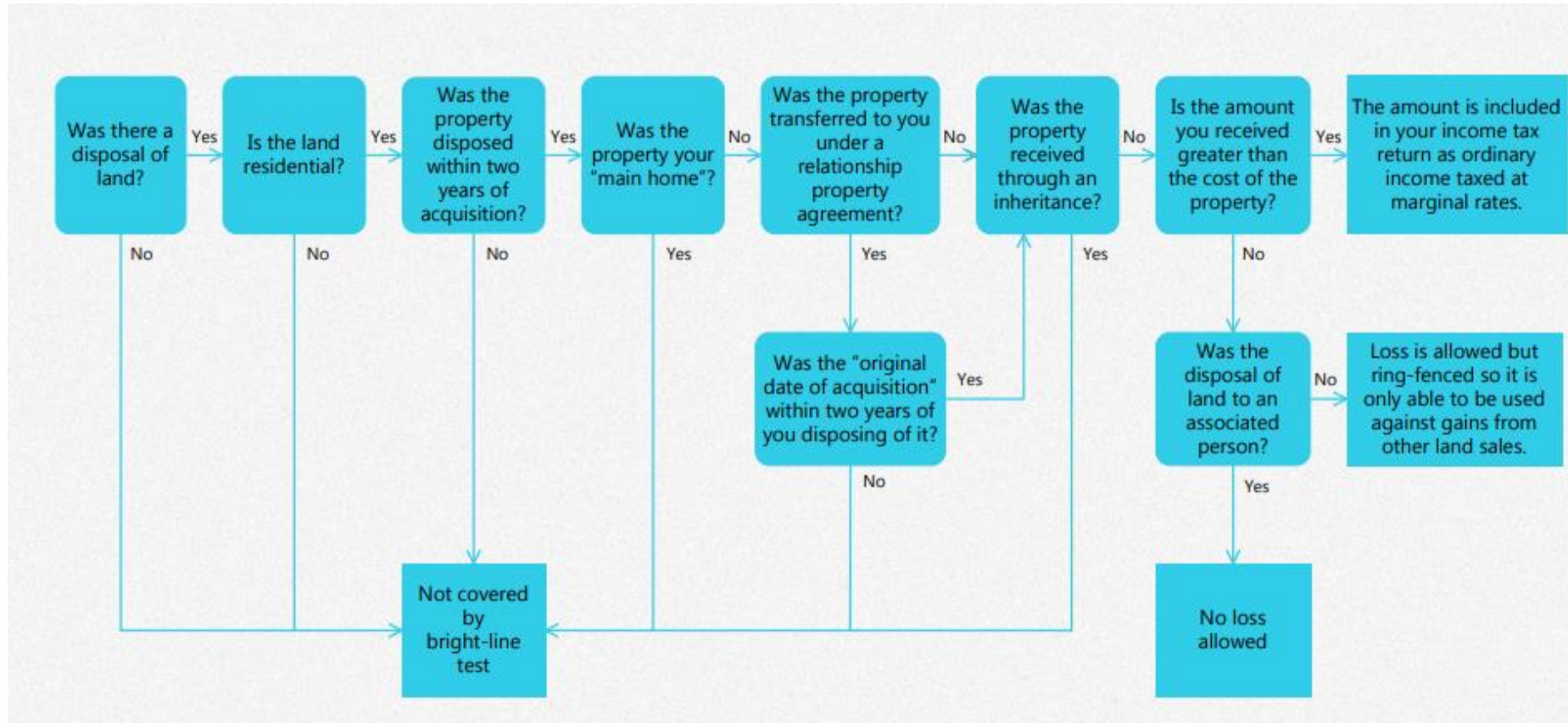
“富地公司” - 按照市值计算，公司直接或间接拥有的住宅用地占公司资产的50%或以上

Land rich company: residential land owned directly or indirectly by the company makes up 50% or more, by market value, of the asset of the company; and

如果在12个月的时间内出售50%或以上的股份，并且其目的或者效果是规避明亮线规则，这样的出售或者股份转让将被视为与土地出售有同样效果 - “deemed disposal”

Deemed disposal of property held by a land-rich company if there is a disposal of 50% or more of the shares within a 12-month period, with a purpose or effect of defeating the intent of the bright-line test

明亮线规则 The bright-line test





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03

2018新西兰宏观经济走势

Trend of 2018 New Zealand Macro Economic



演讲嘉宾



Jarrod Kerr

KIWI BANK 首席经济学家

Jarrod将从宏观经济学出发，利用大数据，
解读2018新西兰经济走势，
为投资者提供最直观的数据支持。

The property market is about timing

...short term risks make way for long term gains

It's
Ours.

**Kiwi
bank.**



Jarrold Kerr
Chief Economist

Connect with KiwiEconomics on:



@kiwieconomics



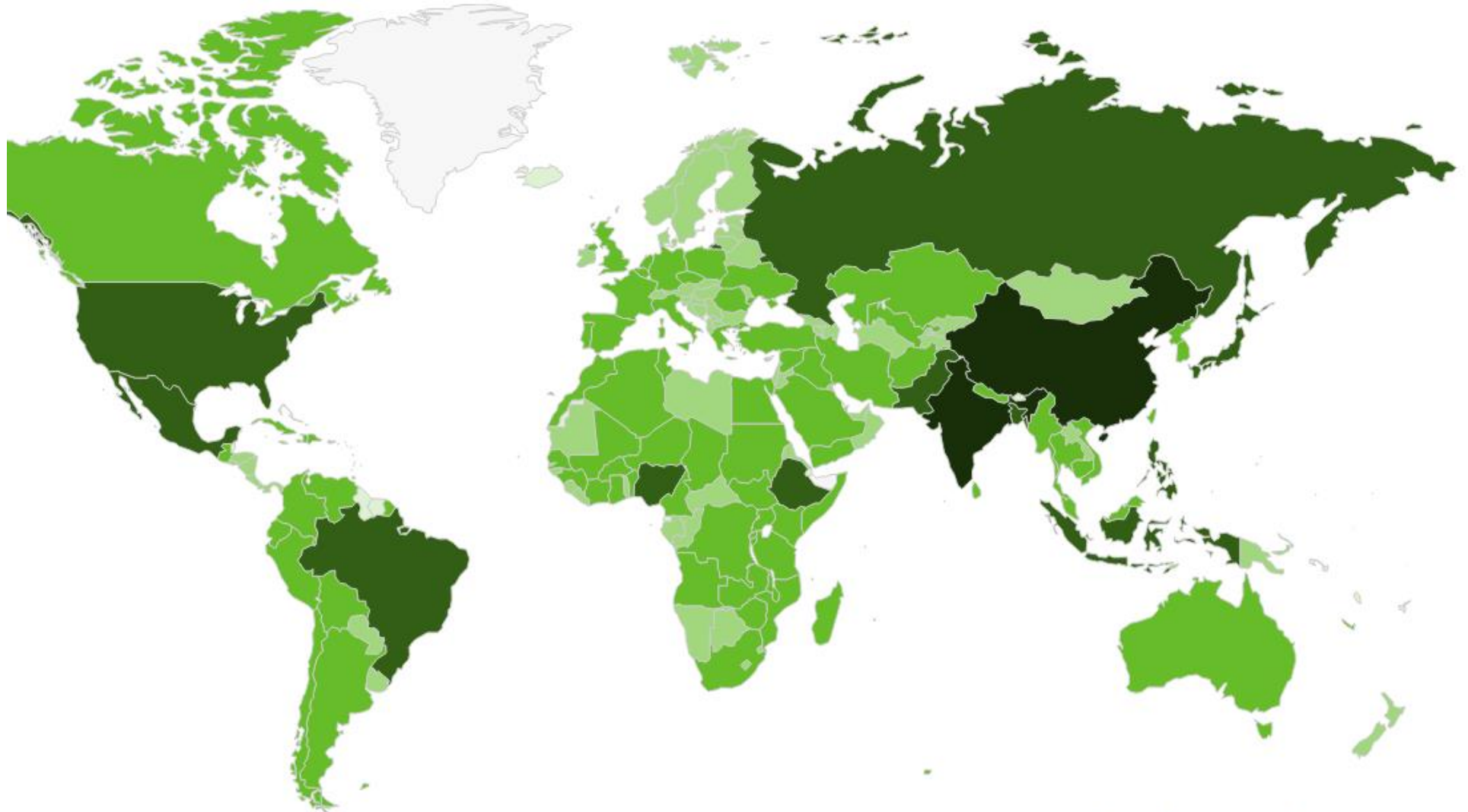
inner.kiwi/commentary/



kiwieconomics@kiwibank.co.nz

We are geographically closer to the action.

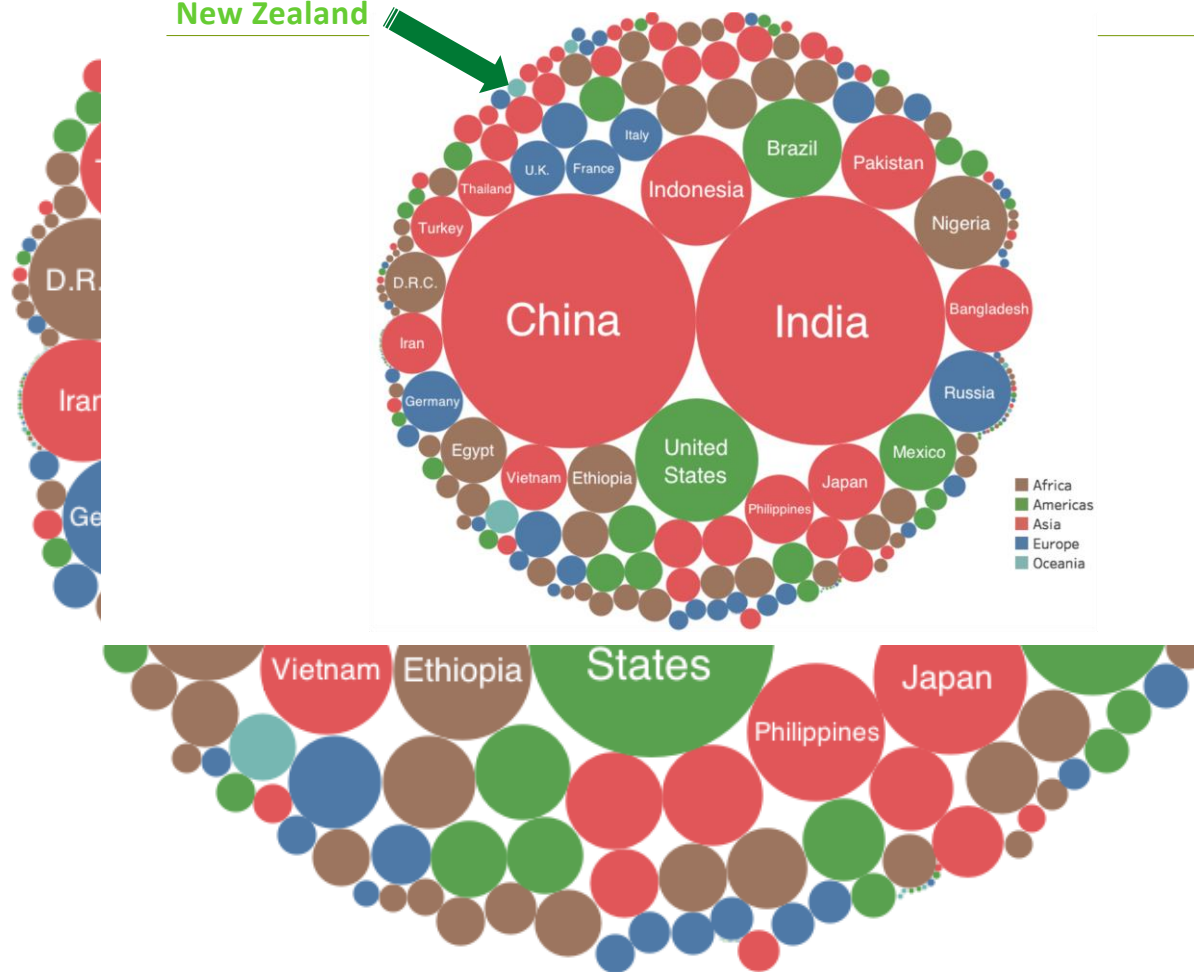
We are right next door to the most populous part of the planet.



New Zealand



New Zealand



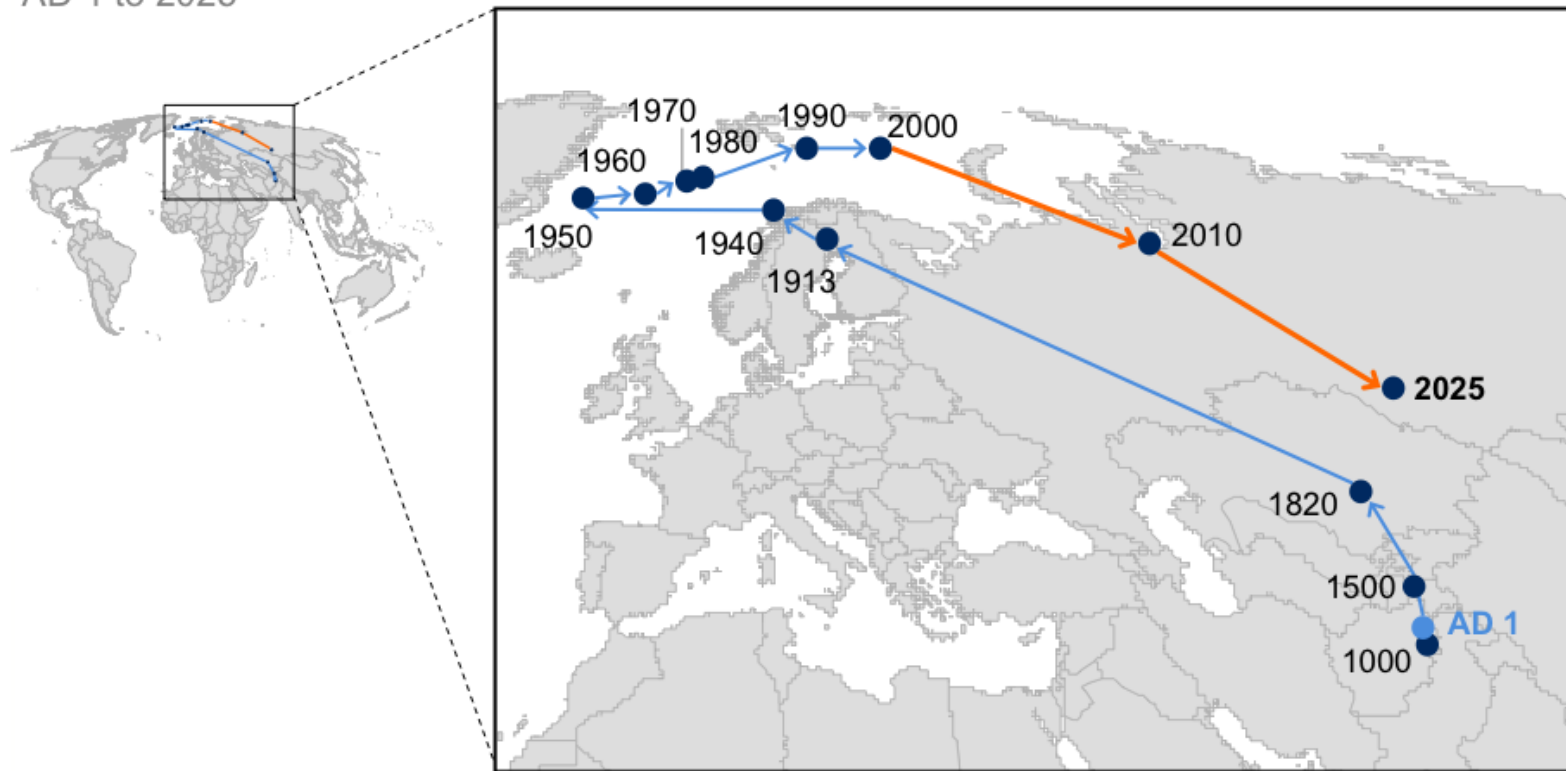
50

The economic centre of the world is *still* shifting.

By far the most rapid shift in the world's economic center of gravity happened in 2000–10, reversing previous decades of development

Evolution of the earth's economic center of gravity¹

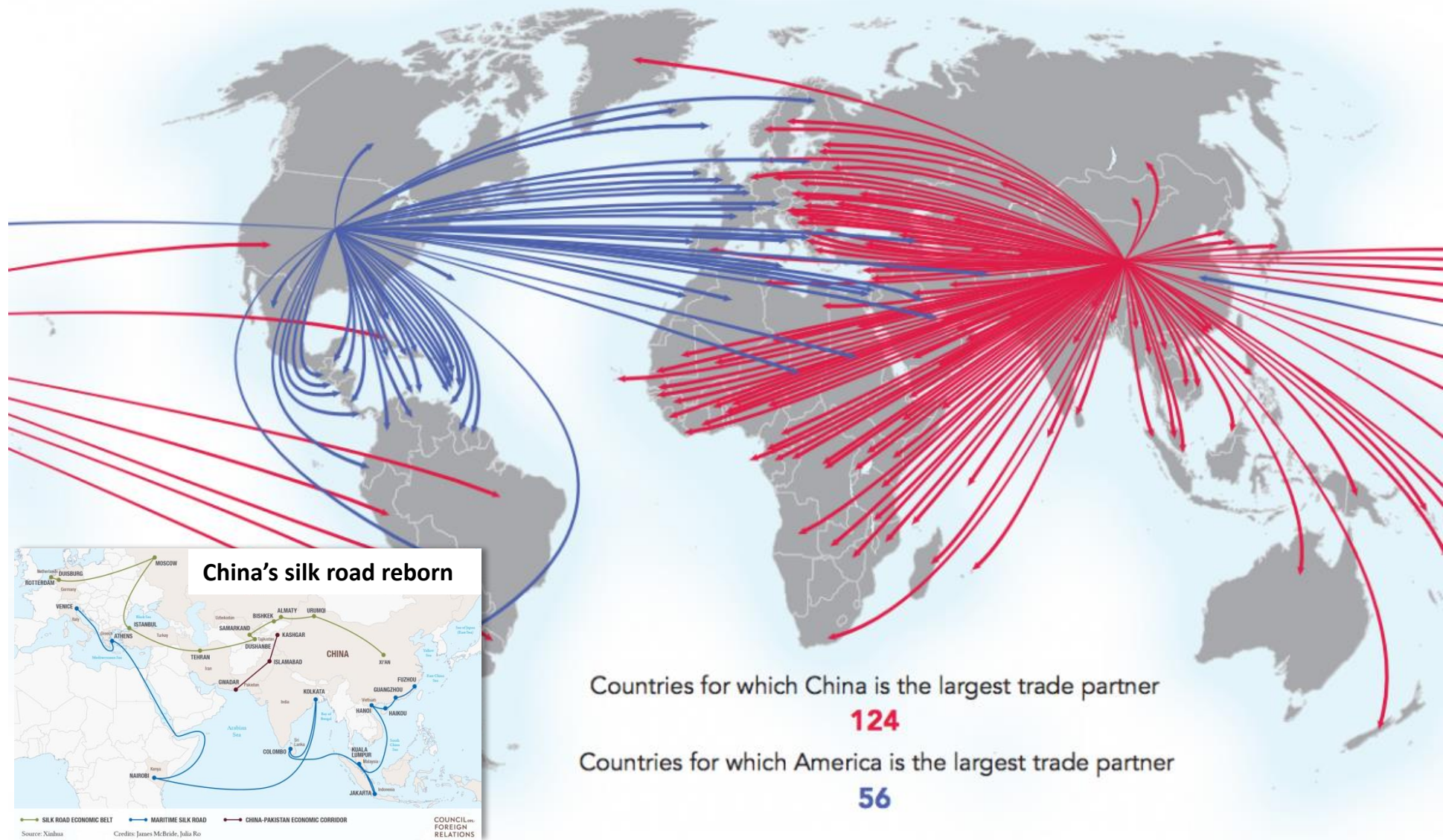
AD 1 to 2025

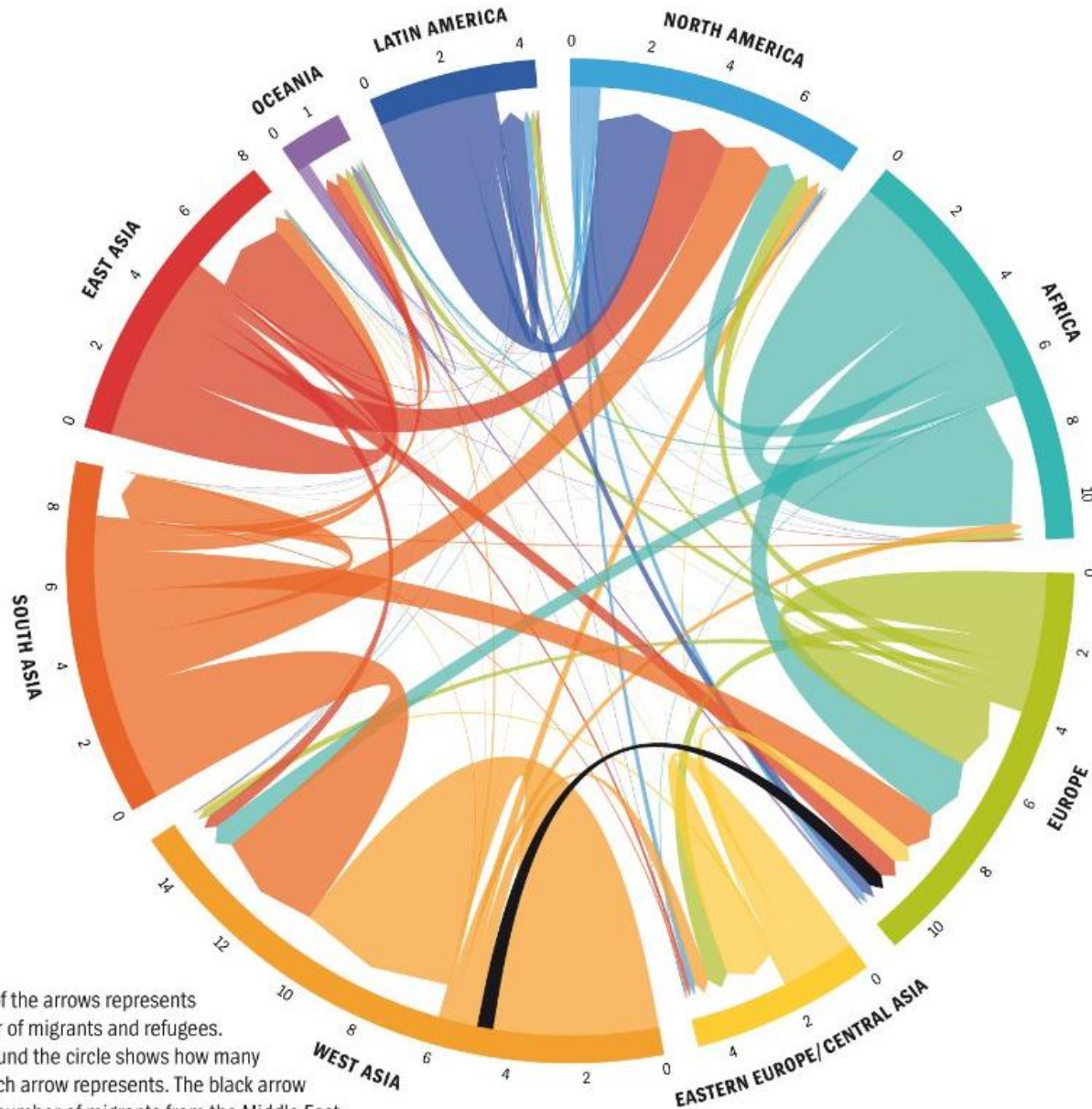


¹ Economic center of gravity is calculated by weighting locations by GDP in three dimensions and projected to the nearest point on the earth's surface. The surface projection of the center of gravity shifts north over the course of the century, reflecting the fact that in three-dimensional space America and Asia are not only "next" to each other, but also "across" from each other.

SOURCE: McKinsey Global Institute analysis using data from Angus Maddison; University of Groningen

China is the world's largest trading partner.





The width of the arrows represents the number of migrants and refugees. A scale around the circle shows how many millions each arrow represents. The black arrow shows the number of migrants from the Middle East, including those from Syria, migrating to Europe up until mid-2015.

Source: Guy J. Abel

“Migration paths do not lead primarily from very poor to very rich countries, but rather adhere to a graduated model. People move to countries where the economy is somewhat stronger than in their native country... from Bangladesh to India or from Zimbabwe to South Africa.”

The US attracts a vast array of migrants (Latin, Asian, African).

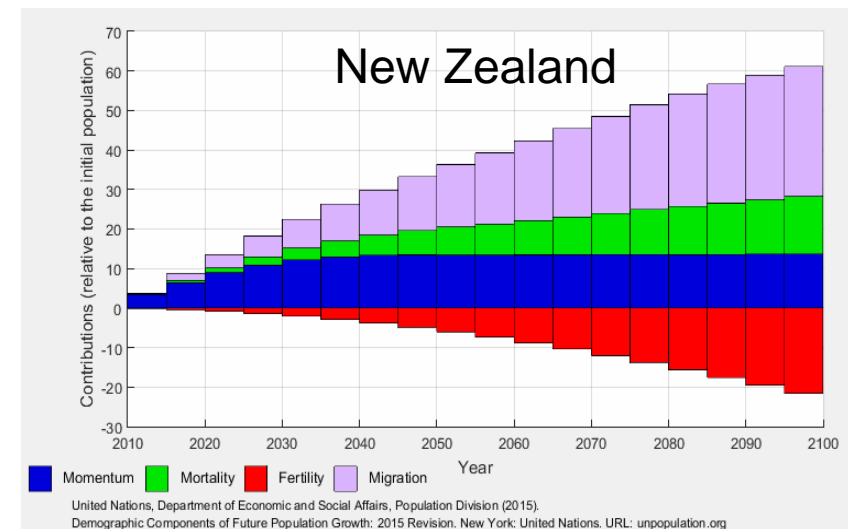
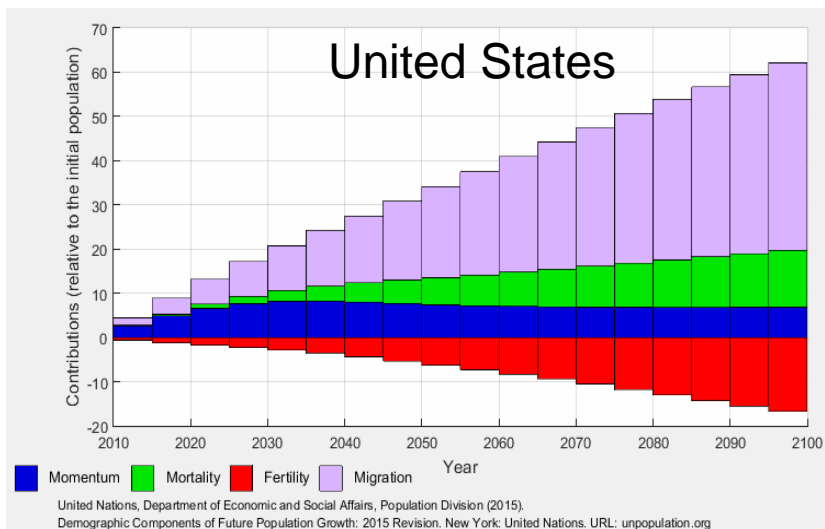
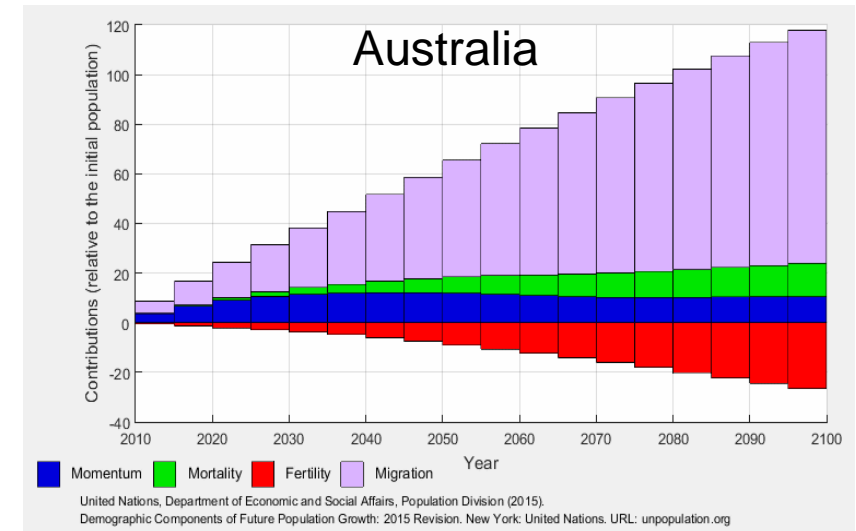
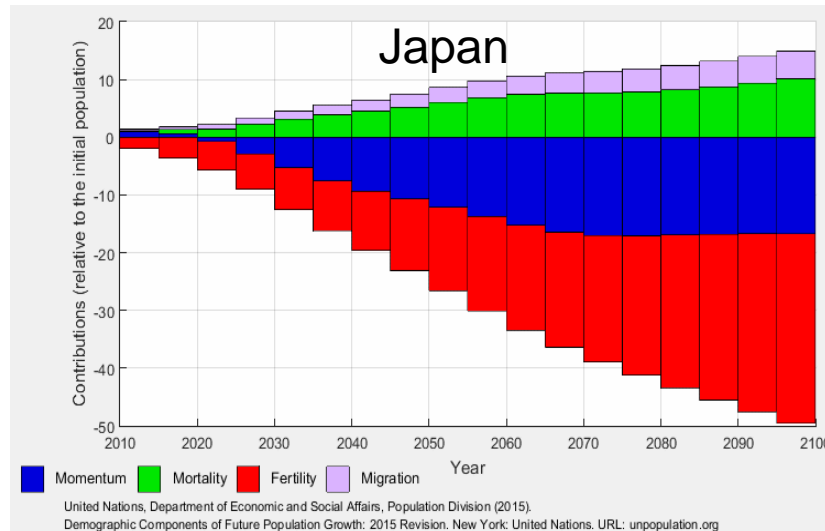
The EU also attracts many migrants from many nations (African, Asian).

Most of Asia’s migrants stay on the continent (despite largest outflows).

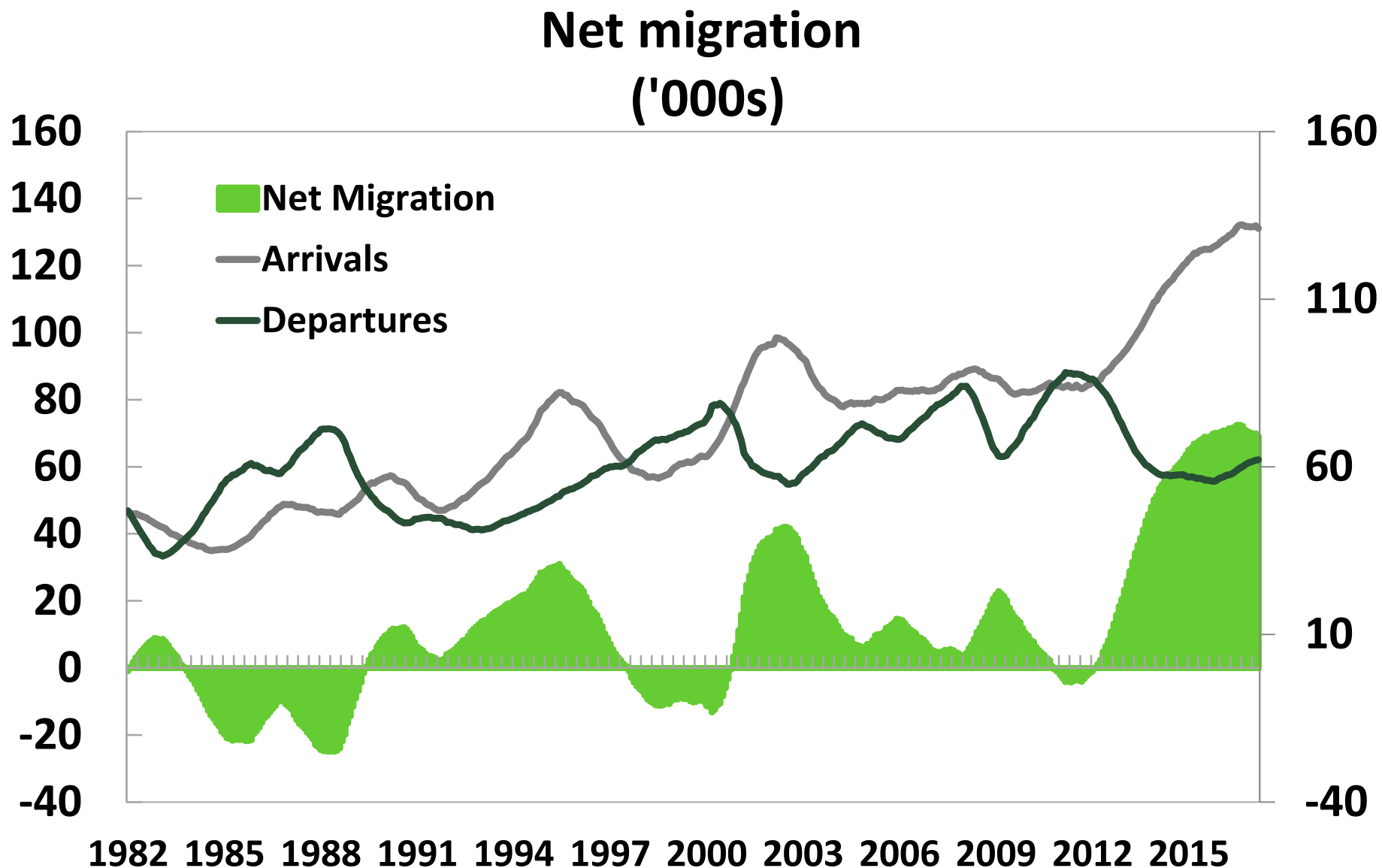
Australia and New Zealand now attract more migrants from East Asia, South Asia, and Africa over Europe.

Migration matters more than most metrics.

Contributions to population growth split by momentum, mortality, fertility and migration (purple).

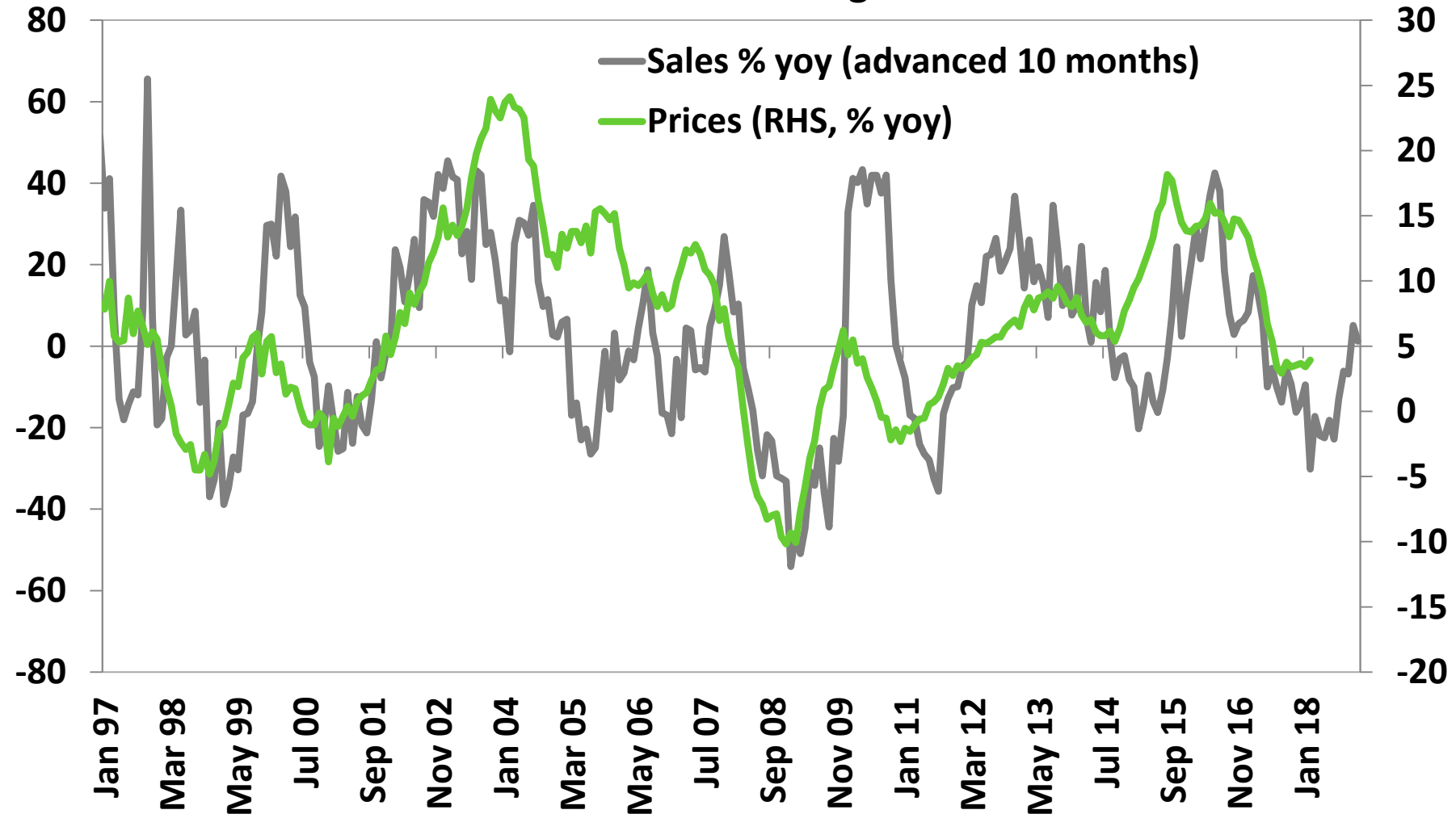


Population growth to remain high?

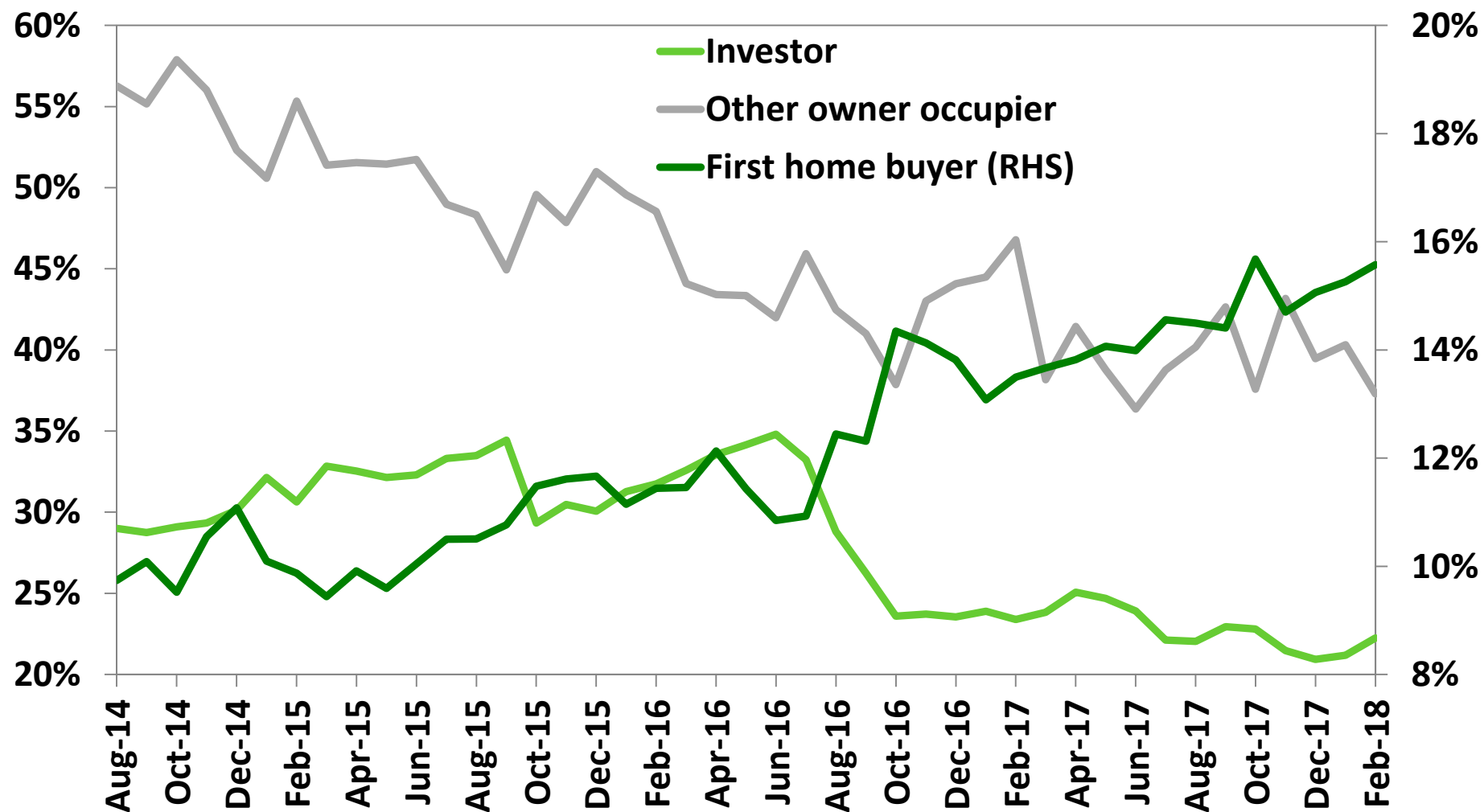


Housing market looks to have stabilised

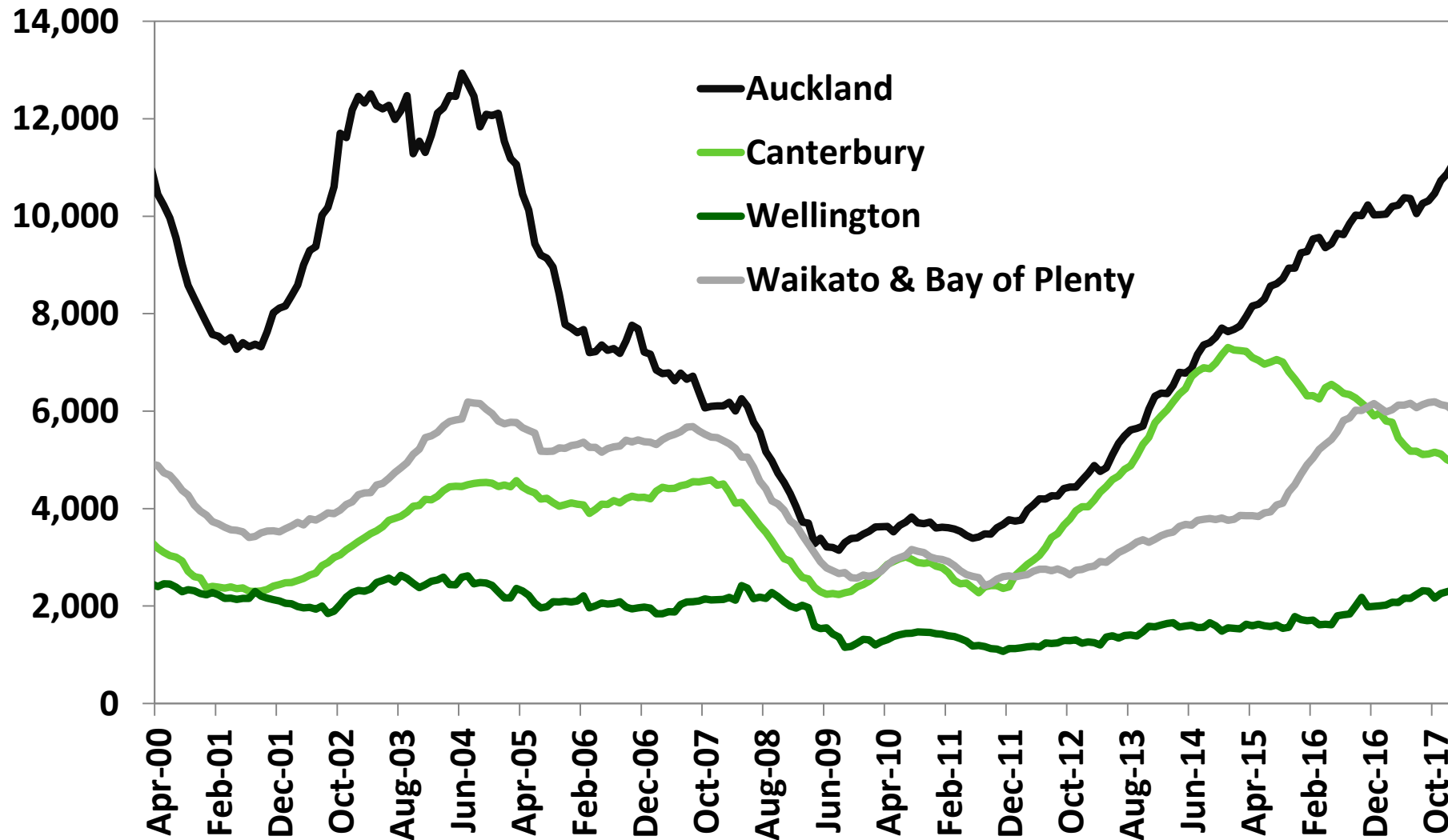
REINZ sales and prices
Annual % change



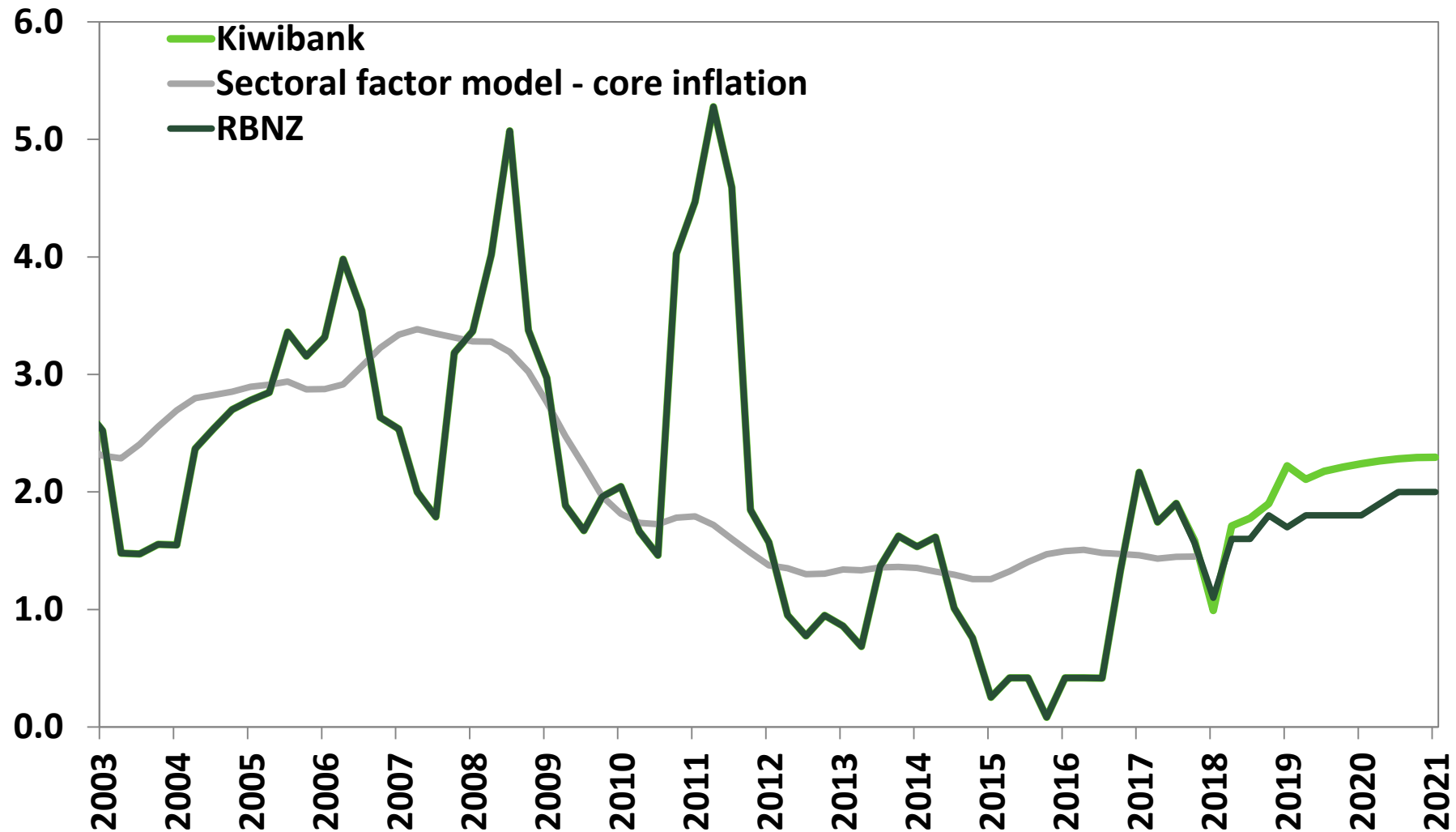
Property investors look side-lined



It's not as if building activity has dried up



Inflation has been stubbornly weak

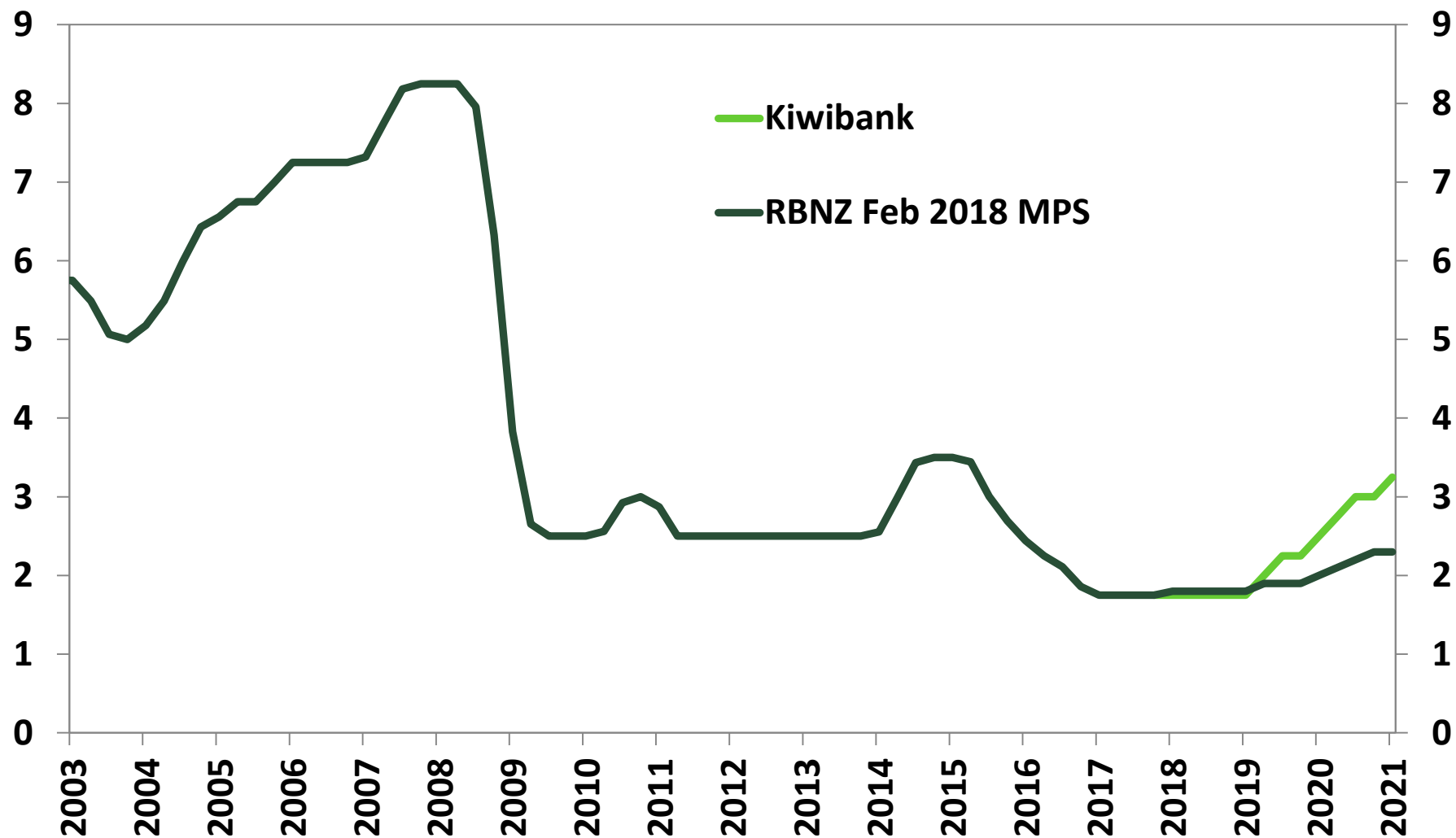


Wage growth a factor behind forecast

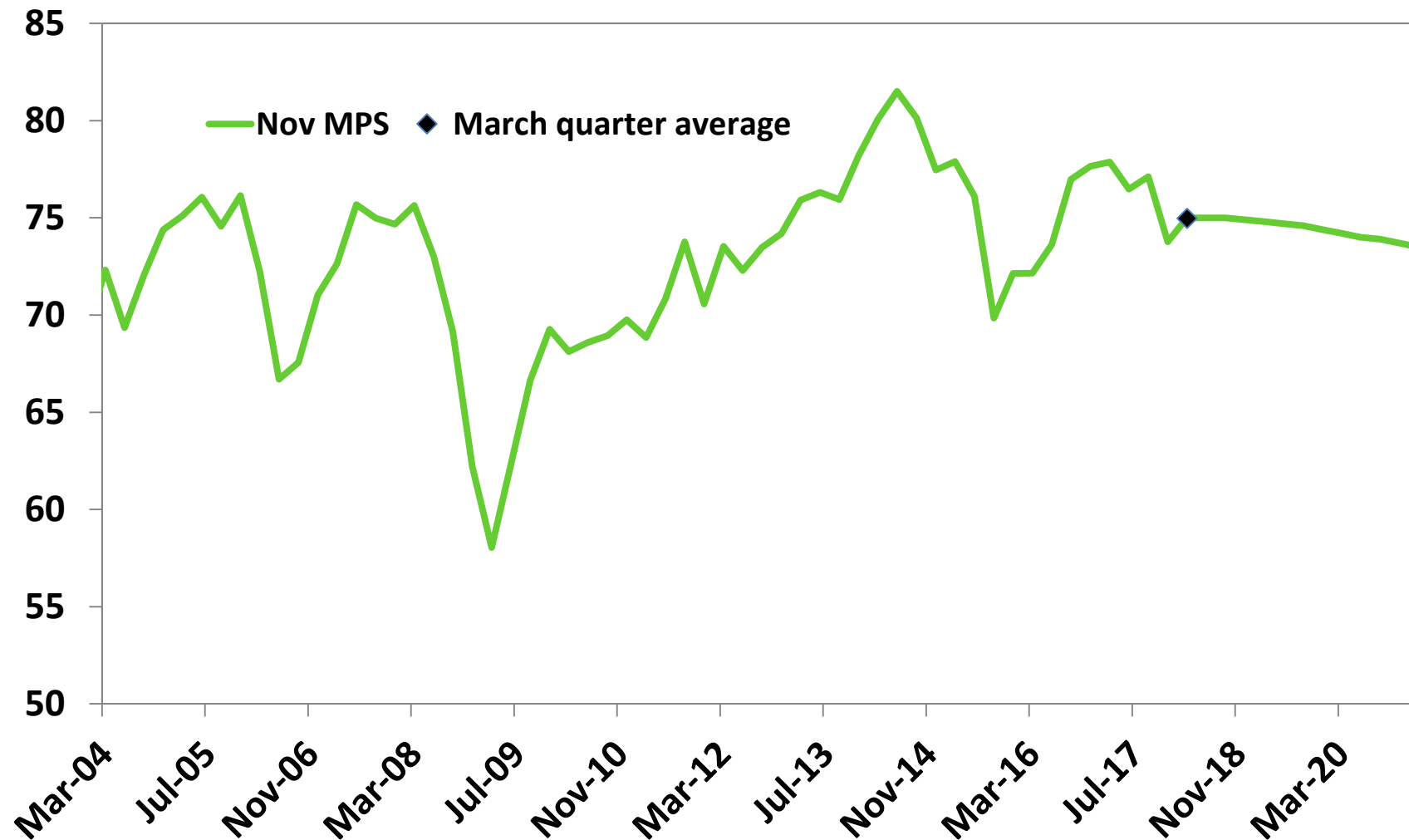
**Private Sector Labour Cost Index
% YoY**



OCR expected to rise from mid-2019



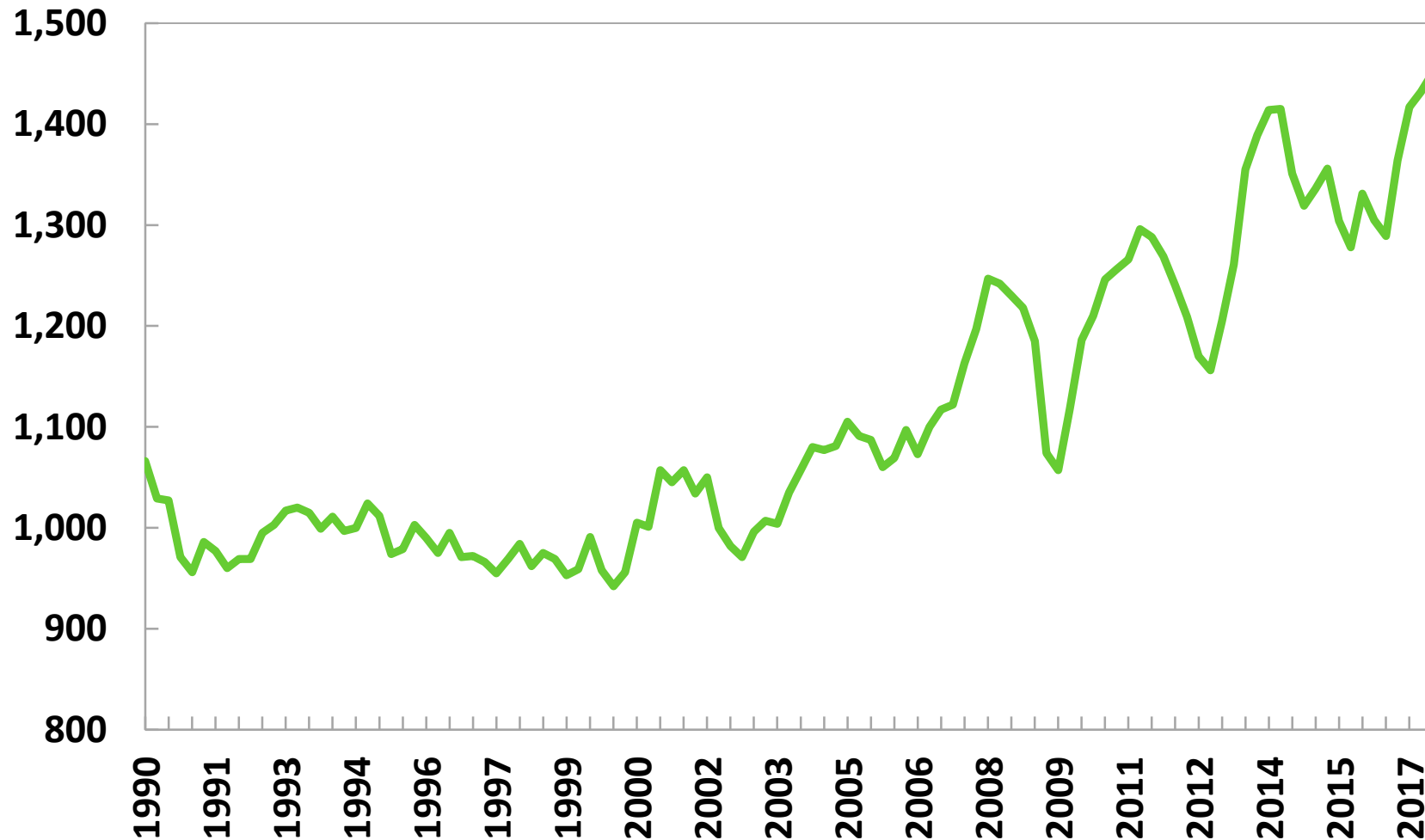
A stubborn exchange rate is a result



Economy supported by record ToT

Merchandise Terms of Trade

Index (June 2002 Qtr = 1000)



Several risks could derail the outlook



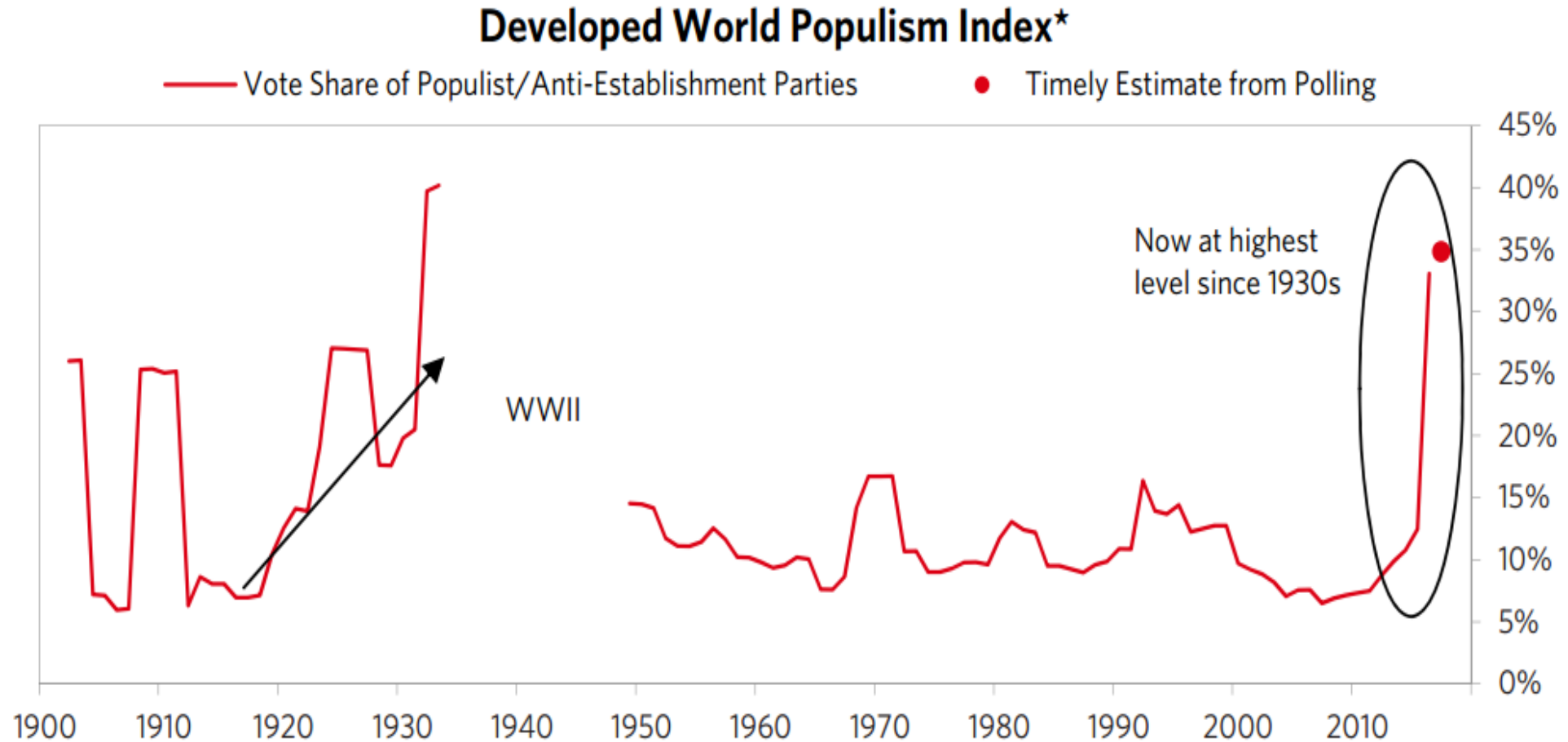
A full-blown trade war could hit global growth

Unwinding of global monetary policy may throw up a few bumps



The rise of the angry voter, is popular in disbelief.

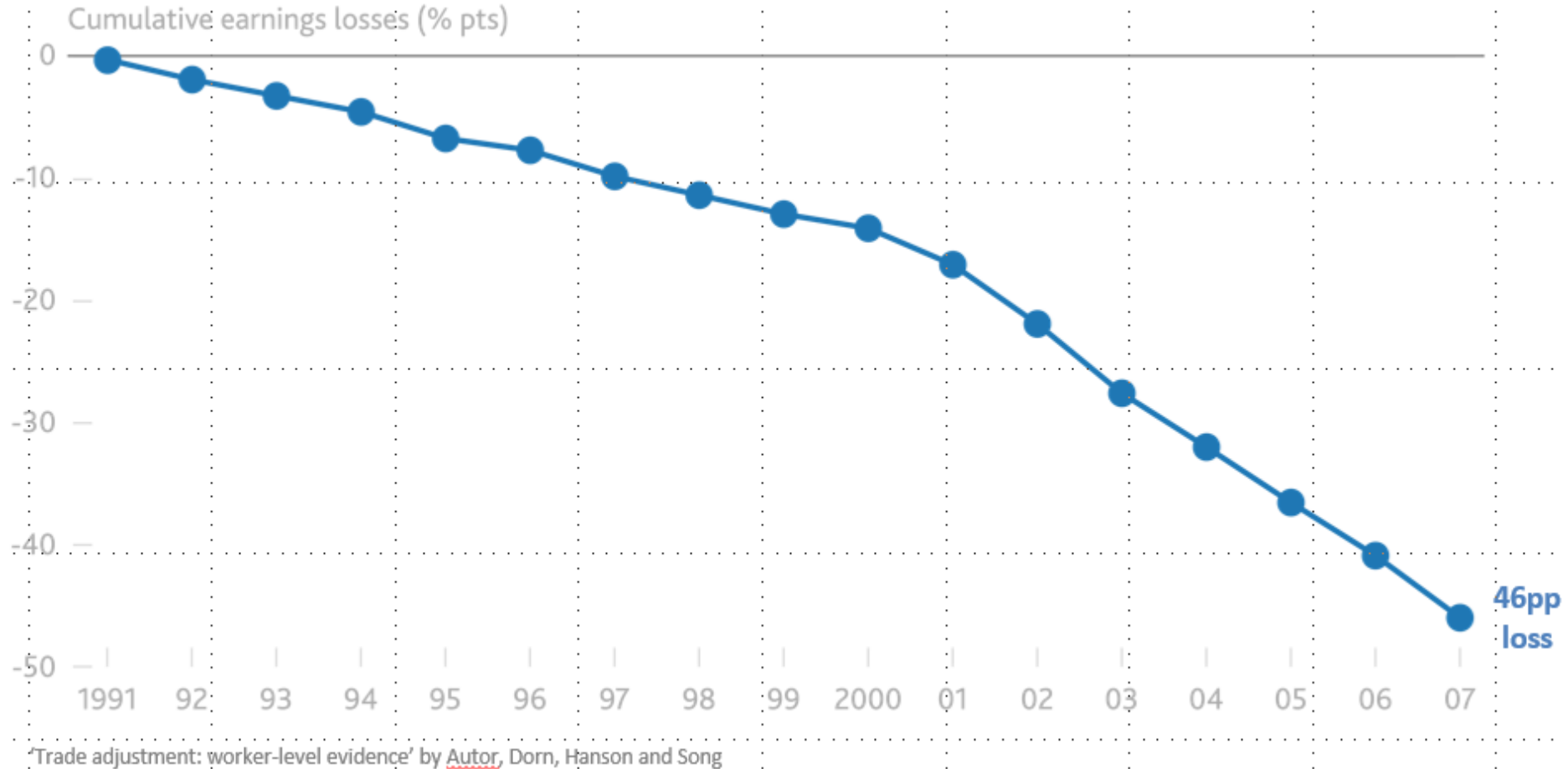
Economy growing around trend



**The latest point includes cases like Trump, UKIP in the UK, AfD in Germany, National Front in France, Podemos in Spain, and Five Star Movement in Italy. It doesn't include major emerging country populists, like Erdogan in Turkey or Duterte in the Philippines. (Bridgewater Daily Observations)*

Globalisation, and EU entry, exposes some workers.

The relative wages of workers exposed to global labour markets get squeezed.



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04

解读奥克兰统一规划

Unitary Plan of Auckland



演讲嘉宾



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Frank Cui

E智论坛创始人Frank Cui

新西兰宏硕资本创始人，新西兰银行和投资界最具影响力的人物之一。曾任BNZ亚洲银行创始人及首席执行官。



演讲嘉宾

Plan Co.

Enabling Positive Change



Mark Weingarth

Plan Co Ltd创始人

原奥克兰市政资源许可部门管理团队成員，Mark在英国政府规划部门任职数年，在创建Plan Co Ltd之前，作为一名规划师，Mark熟知新西兰资源许可条例和申请人的需求。他将在此次房兴未艾讲座中与Frank Cui一同解读新西兰资源许可政策，为来宾答疑解惑。

Plan Co.

Enabling Positive Change

Mark Weingarth – Director / Planning Consultant

Overview

- Experience Pre Plan Co.
- Plan Co. Establishment & work
- The good, the bad and the ugly of the Unitary Plan
- Update on Appeals
- What's next
- Q+A session



Experience

- Work with Auckland Council
- Types of Projects
- Unitary Plan Development and Review
- Plan Co. scope of work



The good, the bad and the ugly

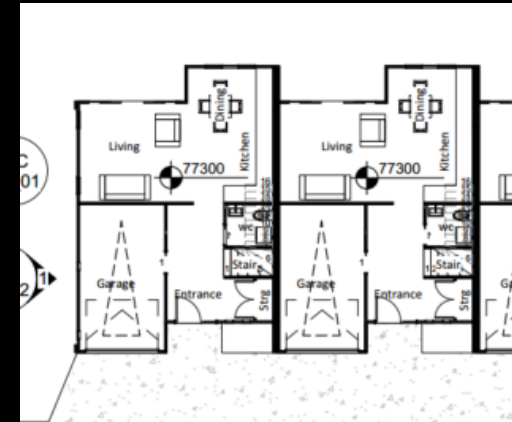
- What is the Unitary Plan & why have it?
- History & Development of the plan
- Teething problems
- Resolution of appeals
- Key considerations for investment, development or holding land
- What's next & where to from here?



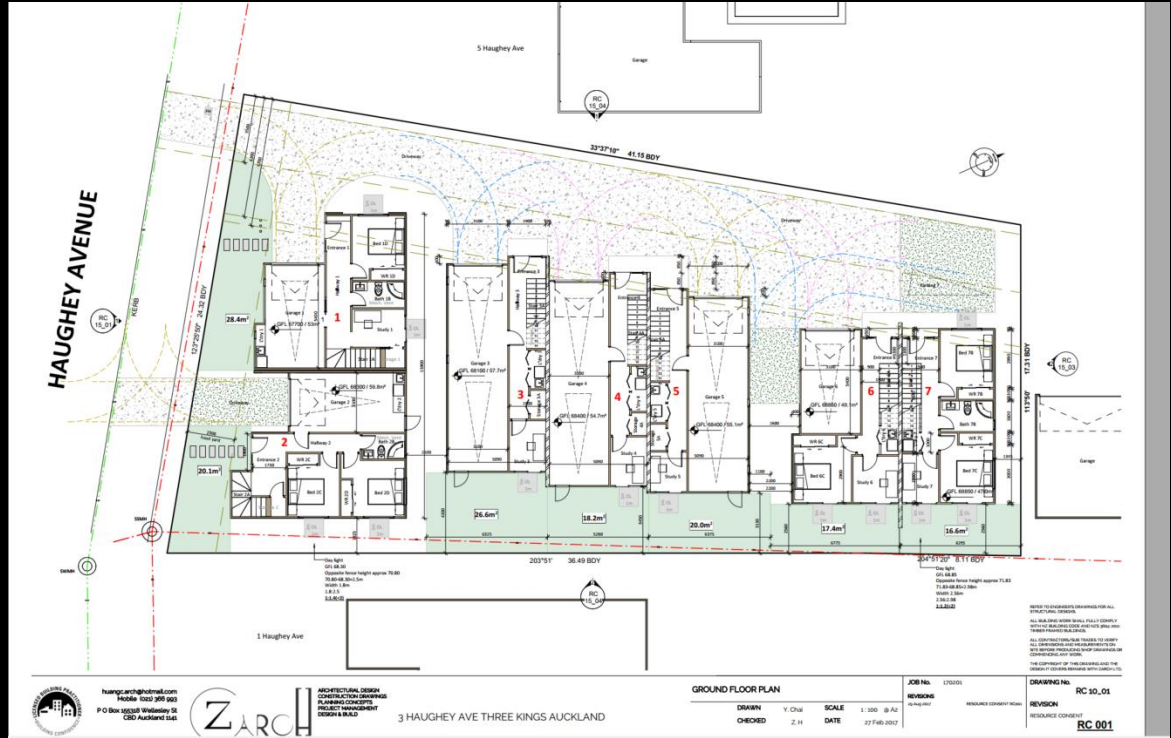
Plan Co.

Enabling Positive Change

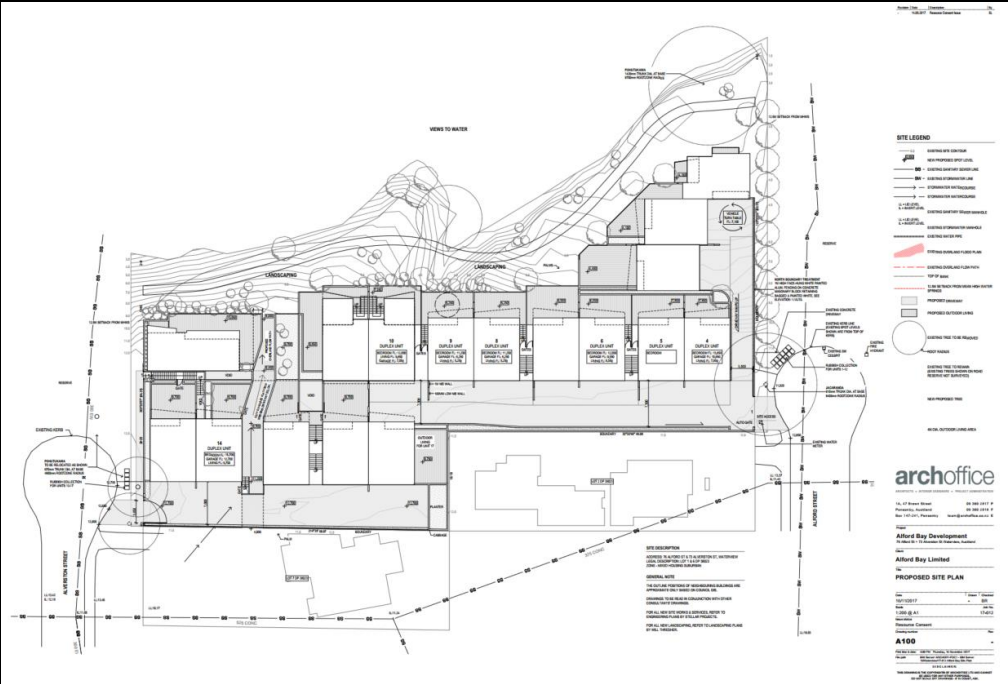
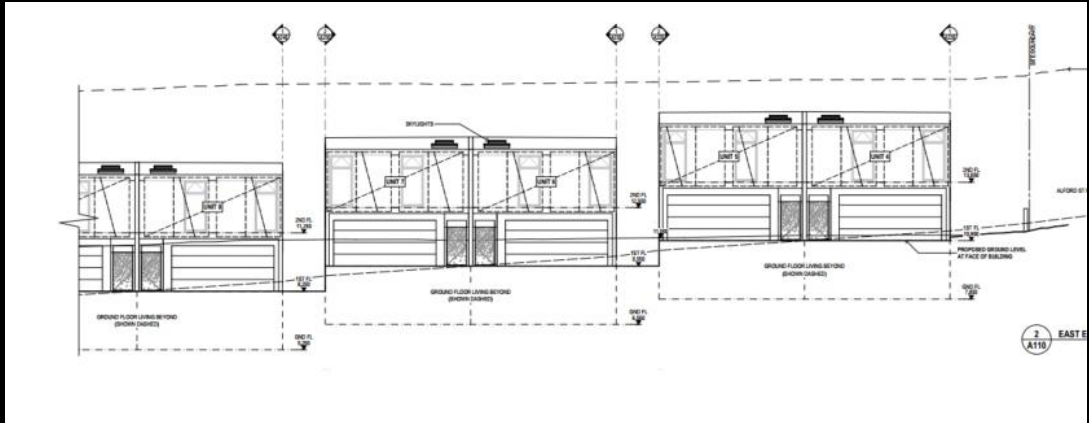
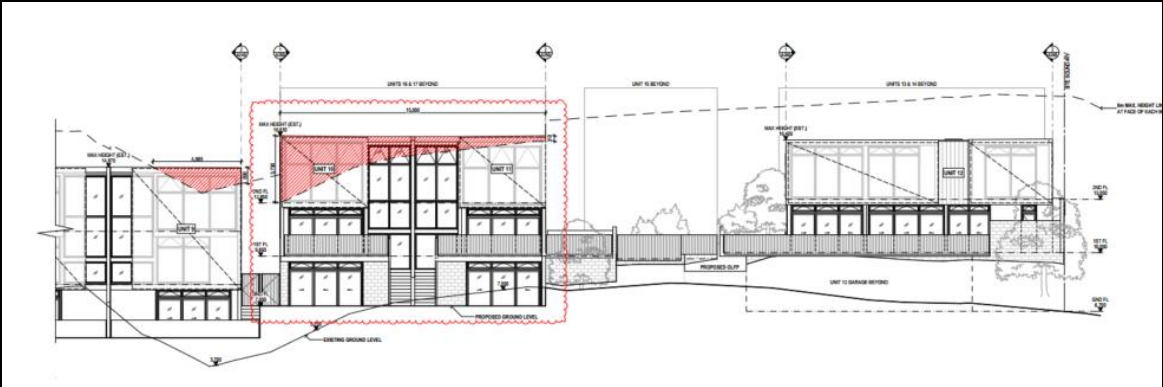
8 & 8A Buckley Road, Epsom



3 Haughey Avenue, Hillsborough



Alford Bay, Waterview





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05

专家问答环节

Q & A



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房兴未艾

与专家面对面轻松谈房说财经

新西兰天维网
SKYKIWI.COM



宏碩資本
EVERBRIGHT
FINANCE

安居 新西兰
YIJU.CO.NZ

—— 联合主办 ——

HouGarden.com
NZ Real Estate Worldwide

Kiwi bank.

Deloitte.

myland
PARTNERS

Plan Co.
REALTY

DREAMHOME
REALTY

APPLIANCE
STAR 大家电

Create a
Kitchen
Kitchen & Bathroom Creators

H
ONE CONSULTING LTD.

HORN TECH

G
GEORGE LAND
CONSTRUCTION

新西兰华人
建筑协会

老虎證券
TIGER SECURITIES

TELNET
新西兰网通电视

CRIMSON

新西兰华人
建筑协会

新西兰海陸聯運公司
Seastar Logistics Ltd

RE/MAX
Partners

YSQUARED
卫思会计师事务所
Chartered Accountants



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Work Shop

1

新西兰宏硕资本

专业贷款与保险顾问与你一对一，解决有关个人贷款、建筑贷款、项目开发贷款、商业融资、个人及商业保险问题。

2

逸居 & CHAPMAN TRIPP律师事务所

当下的政策环境下，进行投资分析和决策时，应如何考量新西兰《海外投资法》的影响，如何获得新西兰海外投资办公室（OIO）的审批。

3

卫思会计师事务所

在新西兰做生意最容易被IRD调查的五种错误，如何通过 Voluntary Disclosure 减免审计罚金。

4

景宏集团 DreamHome

奥克兰统一规划案例解析。



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E智论坛之房兴未艾
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