

# 2024 Deloitte National Tax Conference

## Presenter Biographies

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### **Hon Simon Watts**

#### **Minister of Revenue and Minister of Climate Change**

Simon Watts is the Minister of Climate Change and Minister of Revenue. He has served as the MP for North Shore since 2020.

Simon gained a Bachelor of Management Studies, qualified as a Chartered Accountant, then later gained a Bachelor of Health Science (Paramedicine) at the Auckland University of Technology and is a registered paramedic. He has over twenty years of international banking and finance experience in the private and public sectors.



### **Bruce Wallace**

#### **Partner**

I lead the Tax & Business Advisory team for Deloitte New Zealand and enjoy helping my clients solve complex tax problems and ensuring their international tax affairs are structured in an appropriate and efficient manner. In my view understanding the business strategy and longer-term objectives are key to developing a sustainable long-term structure. I have particular experience in international tax matters having worked in our U.S. firm and from assisting a number of New Zealand's largest outbound investors with their international affairs.



### **Liza Van Der Merwe**

#### **Partner, Deloitte Access Economics**

I am a specialist Deloitte Access Economics Partner, based in Auckland. I have extensive knowledge and practical experience in econometrics, economic network regulation, competition economics, micro and macroeconomic analysis, and strategy. With a Masters degree in Econometrics and more than 20 years of experience as an economist, I have developed a deep understanding of complex economic issues and economic models that are most relevant to provide effective solutions for public and private sector clients.



### **Patrick McCalman**

#### **Partner**

I enjoy helping my clients understand how tax impacts on their business, and the options they have for ensuring that the tax outcomes align with their business needs and aspirations. It's about making my advice real in the context of what they are trying to achieve and helping them see both the opportunities and the risks that may arise and need to be managed. I work across a range of industries, drawing on my own client-side experience to ensure that I give pragmatic, valuable advice.

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**Alex Mitchell****Partner**

I focus on corporate tax consulting and compliance assistance, advising clients of all shapes and sizes including listed entities, private equity, property investment, and large family-owned groups. I build lasting relationships with my clients by focusing on what matters to them, getting to the heart of technical issues and breaking down the complex to deliver practical and tailored advice. I have worked extensively in tax policy navigating Inland Revenue and government and enjoy acting as an advocate for tax reform that reduces red tape and compliance costs on business. I am a member of the Chartered Accountants Australia New Zealand Tax Advisory Group.

**Robyn Walker****Partner**

I am a Partner within the Tax Team at Deloitte in New Zealand. This involves many things, including preparing submissions on behalf of Deloitte and developing thought leadership in the area of tax. I like to think about how tax developments really impact on Deloitte's clients. I have a particular interest in tax policy and keeping up to date with all the many tax developments. I help Deloitte to advise the Corporate Taxpayers Group.

**Campbell Rose****Partner**

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.

**Troy Andrews****Partner**

Troy is an Auckland-based Partner focusing on corporate tax, technology, outbound investment, infrastructure, and financial services. He enjoys bringing a different perspective when it comes to unbundling tax challenges, to ensure that tax becomes a clear part of the business value map. Troy's aim is to become part of a client's business – as a trusted advisor – to help them grow and find new ways to succeed.

**Nicola Taylor****Co-founder Tax Traders; Co-founder Tax i**

Nicola is the co-founder of accredited B Corp, Tax Traders and new start-up, Tax i. Tax i provides a new source of affordable working capital to all Kiwi businesses, powered by their provisional tax payments and arose out of Nicola's dissatisfaction with the lack of access to smart funding for SMEs during the 2021 Auckland lockdown. Nicola is responsible for the oversight and strategic direction of these companies as well as the ground-breaking people practices and distinctive culture that they are known for. Tax Traders was delighted to be included in the global listing of the top ten Inspiring Places to Work for all of Australasia! Nicola is driven by the pursuit of justice and equity and a deep desire to see business as a force for good in the world.

**Amanda Williamson****Associate Director, Consulting**

I serve as the Generative Artificial Intelligence Lead at Deloitte New Zealand, where I support both Deloitte and our clients in capitalising on the strategic opportunities AI provides. My contribution to the field encompasses the creation of strategic roadmaps, the establishment of cross-functional and multi-region AI governance groups, and the provision of enterprise-level AI education. I utilise my academic background, which includes a PhD, a 15-year track record of excellence in research, and board membership at The Artificial Intelligence Researchers Association, to deliver cutting-edge and robust perspectives.

**Phil Claridge****Associate Director**

Based in the Wellington tax team, I enjoy helping my clients navigate the ever-changing world of tax. I advise a range of corporate clients, with a particular focus on the property and financial services industries. I also work with large membership organisations and am keenly interested in technology's role in tax, particularly the application of advancements in Generative AI technologies.

**Tim Kirkpatrick****Co-CEO, Tax Traders**

Tim is the Co-CEO of Tax Traders and holds primary responsibility for both the financial and operational functions, as well as overseeing the in-house software development to bring their strategy to life. As part of this role, Tim has been the driving force behind many of Tax Traders' tools including the RIT calculator and IR data integrated reports. Tim is a Chartered Accountant with substantial experience across a wide variety of industries in New Zealand and the UK. Tim believes that Tax Traders exists to make the complex simple and solve problems that are yet to be solved, and he applies this to his leadership every day.

**Sam Mathews****Partner**

I have over 14 years' experience in Corporate Tax, advising a wide range of clients on a wide range of issues. I am passionate in seeing my clients succeed and contribute to this by providing practical advice on technical issues.

I have a deep specialisation in international tax, helping clients in both the Corporate and Private (including HNWI) markets navigate the complexities of the international tax world.

**Jess Wheeler****Partner**

Jess is a Partner in the Christchurch Tax team. She has been a qualified Solicitor for the past 16 years, working as a tax specialist in New Zealand and Australia. She specialises in providing tax advice to large corporate clients, including tax structuring and transaction advice, compliance matters, advising on IR matters such as disputes and rulings, as well as leading our local Payroll and FBT team.

**Phil Stevenson****Partner**

I am a Tax Specialist Partner in Dunedin with experience across a wide range of industries including Energy, Construction, Financial Services and the Primary Sector. I advise private individuals, public sector organisations and privately owned corporates and SMEs.

I also specialise in providing succession planning and intergenerational wealth transfer advice to High Net Worth Families.

**Jodee Webb****Partner**

The tax environment is in a state of change on a global scale. I really enjoy working alongside organisations to make their tax function fit for the future. This includes exploring and implementing tax strategy, governance and technology solutions that can help manage risk, competing demands for tax resource, and make the most of opportunities. I'm passionate about getting to know my clients and their business in order to provide practical, commercial and jargon free tax advice. In particular focusing on corporate tax and the constantly evolving international tax landscape.

**Kirstie Anderson****Director**

I am a Director in Deloitte's Auckland Tax team working in the large corporate market, with a particular focus on inbound and outbound multinationals operating across a range of different industry sectors, including energy, agriculture, viticulture and retail/consumer. I help clients with all aspects of tax compliance, advisory and tax effect accounting. I also specialise in the growing area of tax governance, helping corporates to uplift the state of their tax governance as part of their social licence to operate.





**Nadia Ali**  
**Director, Risk Advisory**

I am a Wellington-based Director in Deloitte's Risk Advisory team. I am passionate about helping my clients embrace risk and deal with uncertainty. I've assisted them to seize opportunities and manage risk related to their people, processes and systems with tailored and practical solutions. My experience includes technology risk advisory, internal audit, third party governance, and business process improvement.



**Allan Bulló**  
**Partner**

Allan is always happy to talk about all things GST. Having worked exclusively in GST in both New Zealand and Canada for well over two decades, Allan has experience in solving GST issues and problems in very practical and pragmatic way for a large variety of industries.



**Jeanne du Buisson**  
**Partner**

I'm an indirect tax specialist with a passion for helping clients manage their GST, VAT and customs obligations so that they can focus on their business. I lead a number of national indirect tax initiatives and co-lead our national indirect tax team. I work closely with a range of corporate and private New Zealand businesses in a wide range of industries. I have more than seventeen years' indirect tax experience serving both local and multinational companies in New Zealand and across the world. I enjoy every aspect of my role and find it very rewarding dealing directly with clients and building a trusted adviser relationship with them.



**Sarah Kennedy**  
**Director**

I have a focus on indirect taxes including giving GST, FBT and charities advice. More specifically I really enjoy managing tax governance and procedure reviews both in preparation for and during what can be a daunting Inland Revenue risk review process. Having such a broad range of experience means that no day is the same and I really enjoy the variety in my role.

GST is a tax that on that at first glance seems simple but under the surface there's a lot of complexity in a very small Act. My favourite days are those where I can share my enthusiasm for GST with clients, help them to make sense of the rules and find a solution that is appropriate for their team and their business.

**David Watkins****Tax Partner, Australia Tax Insights and Policy Group Leader, Deloitte Asia Pacific  
Tax Policy Leader, Deloitte Australia**

David Watkins is the leader of the Deloitte Australia Tax Insights & Policy group. David has over 25 years' experience in corporate income tax and international tax covering a wide range of tax issues across various industry sectors. David has worked in Malaysia, Singapore and New York. In his current role, David's focus is on emerging tax developments and in particular, the Australian tax reform debate and the international process addressing Base Erosion & Profit Shifting (BEPS). The Tax Insights & Policy group is involved at various stages in these emerging issues including consultation and submissions, publications and presentations and assessing the impacts of tax law changes.

**Annamaria Maclean****Partner**

It's an interesting time to be working in tax with the constant change which brings constant challenge! I enjoy helping clients with complex tax issues and their international tax affairs. I have significant experience in tax including working as a tax manager at a large New Zealand listed corporate. I now have a particular focus on tax issues affecting corporates and multinational entities. As part of this I have been highly involved in the base erosion and profit shifting developments and assessing the impact on multinationals operating in New Zealand. I also have extensive experience working on governance reviews for corporates and putting in place the appropriate governance policies and procedures from a tax perspective.