



Will Drafting 2011 – QLD

Mastering the fundamentals of wills & estate planning
21 September 2011, Stamford Plaza Brisbane

- 8:30 Registration
- 9:00 Welcome from the Chair
- Susan McLeod, Barrister, Queensland Bar and Accredited Specialist (Succession Law)**
- 9:15 Navigating wills and family considerations
- Will drafting issues for blended families
 - Preparing wills to consider potential Family Provision Applications
- Judy Hayward, Principal, Hayward & Co Lawyers and Accredited Specialist (Succession Law)**
- 1 CPD point in substantive law
- 10:15 Morning tea
- 10:30 Principles of construction – strategies to avoid or overcome drafting errors
- Analysing s33C of the Succession Act
 - Strategies in the correction of errors in drafting
 - Use of extrinsic material in interpretation
- Dr. Daniel Morgan, Barrister, Queensland Bar**
Sarah Doblo, Solicitor, Gleeson Lawyers
- 1 CPD point in professional skills
- 11:30 Understanding the basics of financials in estate documents
- Getting familiar with superannuation including SMSFs and retail funds
 - Tax strategies, such as advising on the principal place of residence and CGT
 - Examining case studies
- Kieran Hoare, Director, Merthyr Law and SMSF Specialist Advisor**
- 1 CPD point in substantive law

Claim up to 6 CPD points

12:30 Networking lunch for speakers and delegates

PRESENTATION & WORKSHOP

1:30 Tips & traps for the common will drafting issues

- Knowledge and approval
- Cascading gifts
- Fractional distributions
- Accruing gifts
- Articulating trustee powers in a will
- Residuary clauses

Bryan Mitchell, Principal, Mitchells Solicitors & Business Advisors

1.5 CPD points in professional skills

3:00 Afternoon tea

WORKSHOP

3:20 Testamentary trusts – when are they appropriate, and what are the alternatives?

- Getting to grips with when they are actually needed and when to advise that this is the appropriate structure
- What are the alternatives e.g. hybrid structures
- Walking through some example clauses

Noel Duffy, Principal, Duffy Lawyers

1.5 CPD points in substantive law

- 4:50 Closing remarks from the Chair
- 5:00 Close of conference

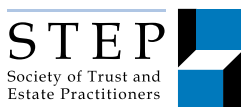
Who should attend?

- Young lawyers
- Articled clerks
- Junior practitioners
- Graduate solicitors
- Paralegals

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Will Drafting 2011

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Position: _____
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- Succession, Families, Property and Death: Text and Cases – 3rd Edition
- Estate Planning – A Practical Guide for Estate and Financial Service Professionals – Second Edition
- Construction of Wills in Australia (Softcover)
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