

Wills Drafting 2012 – VIC

Reinforcing the requisites of drafting complex wills

17 May 2012, Stamford Plaza Melbourne

Program highlights

- Cover all crucial taxation considerations when drafting a will
- Acquire know-how in drafting will clauses for extended life interests and other limited interests
- Examine post death treatment of superannuation entitlements
- Gain a walk-through of drafting Powers of Attorney for clients with entities
- Discover how to strengthen will elements through Binding Financial Agreements
- Be skilled in drafting provisions to ensure effective establishment and control of testamentary trusts
- Ascertain the necessary steps to best ensure executor commission

Claim up to 7.5 CPD points

Substantive Law

Professional skills

Speakers

- **Kathy Wilson**, Special Counsel, **Aitken Partners**, Accredited Specialist in Wills & Estates
- **Carolyn Sparke**, Barrister, **Owen Dixon Chambers West**
- **Bill Orow**, Barrister, **Owen Dixon Chambers East**
- **Stewart McNab**, Barrister, **Isaacs Chambers**
- **Peter Szabo**, Principal, **Moores Legal**, Accredited Specialist in Family Law
- **Leonie Englefield**, Barrister, **Isaacs Chambers**
- **Jennifer Dixon**, Principal, **Moores Legal**, Accredited Specialist in Wills & Estates
- **Robyn Sparks**, Special Counsel, **Aitken Partners**, Accredited Specialist in Wills & Estates



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Reinforcing the requisites of drafting complex wills

Thursday, 17 May 2012

8:30	Registration	11:15	How to keep family assets within the family despite your child getting divorced <ul style="list-style-type: none">• The Family Court's treatment of contributions from parents• Trusts controlled by parents not immune from the Family Court• Using a pre-nuptial agreement (BFA) to quarantine such assets• How a BFA can be binding on estates and claims against estates• Same sex couples and de facto couples covered by the Family Court <p>Peter Szabo, Principal, Moores Legal, Accredited Specialist in Family Law</p> <p>■ 1 CPD point in professional skills/substantive law</p>
8:50	Opening remarks from the Chair Kathy Wilson, Special Counsel, Aitken Partners, Accredited Specialist in Wills & Estates		
9:00	Drafting will clauses for extended life interests and other limited interests <ul style="list-style-type: none">• Dealing with the situation where the willmaker or their partner may need to be accommodated in elder care accommodation<ul style="list-style-type: none">– Ensuring proceeds of sale of the estate to be used for alternative accommodation– Allowing entitlement to the surviving spouse of the income produced by the investment of the proceeds from the sale of the estate– Providing for a non-refundable capital contribution to elder care accommodation– Does the life interest to the surviving spouse continue if he or she remarries?– Drafting to consider capital gains tax consequences <p>Stewart McNab, Barrister, Isaacs Chambers</p> <p>■ 1 CPD point in professional skills/substantive law</p>	12:15	Executor's commission <ul style="list-style-type: none">• What steps a solicitor/executor can take to best ensure their commission• Dealing with beneficiaries after death• What is permissible when claiming costs and commission• Drafting issues for gifts to executors and other issues <p>Carolyn Sparke, Barrister, Owen Dixon Chambers West</p> <p>■ 1 CPD point in professional skills/substantive law</p>
10:00	Taxation considerations in drafting wills <ul style="list-style-type: none">• Specific v general bequest/devise• Gifts of life and remainder interests• Tenants in common v joint tenants• Deferred vesting – conditional gifts• In specie distributions v distribution of sale proceeds• Use of testamentary trusts <p>Bill Orow, Barrister, Owen Dixon Chambers East</p> <p>■ 1 CPD point in professional skills/substantive law</p>	1:15	Networking lunch for speakers and delegates
11:00	Morning tea	2:15	Supercharged wills, superannuation death benefits and wills drafting <ul style="list-style-type: none">• Post death treatment of superannuation entitlements• Superannuation considerations in Will Drafting <p>Leonie Englefield, Barrister, Isaacs Chambers</p> <p>■ 1 CPD point in professional skills/substantive law</p>
		3:15	Afternoon tea



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3:30 **Drafting Powers of Attorney for clients with entities**

- Recent rulings and cases on the role of an attorney in family trusts and SMSF's
- Attorneys and binding nominations
- Special condition suggestions

Jennifer Dixon, *Principal, Moores Legal, Accredited Specialist in Wills & Estates*

■ 1 CPD point in professional skills/substantive law

4:30 **Workshop: Testamentary trusts**

- Drafting provisions to ensure effective establishment and control
- Components to warrant balance of protection and flexibility in the long term
- Various scenarios in application
- Drafting to consider taxation matters

Robyn Sparks, *Special Counsel, Aitken Partners, Accredited Specialist in Wills & Estates*

■ 1.5 CPD points in professional skills/substantive law

6:00 **Close of conference**

Who should attend?

- Wills and probate lawyers
- Estate planning lawyers
- Succession law practitioners
- Barristers
- Trustee companies
- Financial planners
- Taxation advisers working in the area of estate planning
- Accountants

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A Practical Guide for Estate and Financial Service Professionals, 3rd edition by, Michael Perkins & Robert Monahan

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Priority registration form

Wills Drafting 2012 – VIC

17 May 2012
Stamford Plaza Melbourne
111 Little Collins Street
Melbourne VIC 3000

5 easy ways to register

Online: www.lexisnexis.com.au/pd
Email: registration@lexisnexis.com.au
Phone: 1800 772 772
Fax: (02) 9422 2338

Mail: Conference Co-ordinator, LexisNexis
Locked Bag 2222, Chatswood Delivery
Centre, Chatswood NSW 2067
or: DX 29590 Chatswood

Please complete sections A, B, C, D

TAX INVOICE

Conference code: PD1112

ABN: 70 001 002 357

A

Delegate 1 details

Mr/Ms/Dr: _____
First name Last name
Organisation: _____
Address: _____
Position: _____
Telephone: _____
Fax: _____
Email (required**): _____

Delegate 2 details

Mr/Ms/Dr: _____
First name Last name
Organisation: _____
Address: _____
Position: _____
Telephone: _____
Fax: _____
Email (required**): _____

Delegate 3 details

Mr/Ms/Dr: _____
First name Last name
Organisation: _____
Address: _____
Position: _____
Telephone: _____
Fax: _____
Email (required**): _____

** to send conference confirmation

C

Event pricing (please tick your selection)

GROUP BOOKING

Register 3 or more people from the same organisation at the same time and book at the advanced price per person.

EXAMPLE

<input checked="" type="checkbox"/>	One day conference	7	\$ 900 + GST = \$ 990	\$990
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Advanced price (register and pay before 9 March 2012)

Please Select	Options	Qty	Price	Subtotal
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Standard price (register and pay after 9 March 2012)

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Conference Resources

☐ I am unable to attend but please send me the Wills Drafting 2012 – VIC conference papers

Qty	Price	Subtotal
	\$180 + GST = \$198	

* Advanced price, team discounts and any other discount cannot be taken concurrently

TOTAL

D

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B

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- ☐ Contracts 2012 – NSW, 14-16 February 2012
☐ Contracts Masterclass – VIC, 15 March 2012
☐ Legal Intensive 2012 – NSW, 15 March 2012
☐ Government Contract Drafting and Tendering – ACT, 27 March 2012

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