

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

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, **Moore's Legal**, Accredited Specialist in Family Law
- **Leonie Englefield**, Barrister, **Isaacs Chambers**
- **Jennifer Dixon**, Principal, **Moore's 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
- 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
- Dealing with the situation where the willmaker or their partner may need to be accommodated in elder care accommodation
 - 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
- Stewart McNab, Barrister, Isaacs Chambers**
- 1 CPD point in professional skills/substantive law
- 10:00 Taxation considerations in drafting wills
- 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
- Bill Orow, Barrister, Owen Dixon Chambers East**
- 1 CPD point in professional skills/substantive law
- 11:00 Morning tea
- 11:15 How to keep family assets within the family despite your child getting divorced
- 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
- Peter Szabo, Principal, Moores Legal, Accredited Specialist in Family Law**
- 1 CPD point in professional skills/substantive law
- 12:15 Executor's commission
- 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
- Carolyn Sparke, Barrister, Owen Dixon Chambers West**
- 1 CPD point in professional skills/substantive law
- 1:15 Networking lunch for speakers and delegates
- 2:15 Supercharged wills, superannuation death benefits and wills drafting
- Post death treatment of superannuation entitlements
 - Superannuation considerations in Will Drafting
- Leonie Englefield, Barrister, Isaacs Chambers**
- 1 CPD point in professional skills/substantive law
- 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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Priority registration form

5 easy ways to register

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Stamford Plaza Melbourne

111 Little Collins Street

Melbourne VIC 3000

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

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Mr/Ms/Dr: _____
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Organisation: _____

Address: _____

Position: _____

Telephone: _____

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Email (required**): _____

Delegate 2 details

Mr/Ms/Dr: _____
First name Last name

Organisation: _____

Address: _____

Position: _____

Telephone: _____

Fax: _____

Email (required**): _____

Delegate 3 details

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** to send conference confirmation

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- 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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| Qty | Price | Subtotal |
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Advanced price, team discounts and any other discount cannot be taken concurrently

TOTAL

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