

ABOUT THE PRESENTERS

Rikki Andrews, Philanthropy Manager, **Trust Company Limited** has extensive experience in business development, cause-related marketing and charitable trust administration. She is currently undertaking a Masters in Philanthropy and Social Investment at Swinburne University to complement the development of Philanthropy best practice at her company. Rikki has established a philanthropic trust with a group of friends and is a member of three non-profit organisations.

Angela Cursio, Solicitor, **Trust Company Limited** is a solicitor having commenced practice in Victoria in 1997. She has previously worked in both corporate and private practice and has been with Trust Company Limited since 2005. Her areas of practice include Wills, Estates, Estate Planning and Estate Litigation.

Barry Fry, Partner, **Maddocks** is an accredited specialist in Wills and Estates and has over 40 years experience in litigation, property transactions and wills and estates. He has handled various significant estate cases in the superior courts and is a trustee of several perpetual charitable trusts. Barry acts as a LEADR accredited mediator in commercial and estate disputes. He was an appointee of the Attorney General's Department for the inquiry into the assets of the Public Trustees. Barry is also the author of numerous publications on wills and estate.

Dr John Glover, Barrister, **Victorian Bar** has practiced as a barrister since the 1980s. In 2005, he re-signed the roll of counsel and all commercial areas are now within his field of practice. John is also an Associate Professor at Monash University. He is the author of several legal texts including over 45 book chapters and articles in refereed law journals. His book *LexisNexis' Equity, Restitution & Fraud* (2004) was sold out with re-impression pending.

Terry Johansson, Principal, **Johansson Solicitors** is an accredited Wills and Estate specialist and has extensive experience in many aspects of estate planning including wills and estates, estate litigation and taxation. He practices and conducts TFM cases in both VIC and NSW. Terry is admitted as a solicitor in England and Wales and was licensed by the Dubai's Ruler's Court to practice as an international lawyer in Dubai. He was instrumental in establishing Society of Trust and Estate Practitioners (STEP) in Australia and Dubai.

Daniel Kelliher, Senior Associate, **Russell Kennedy** has been an accredited Wills and Estates specialist since 1996. He heads his firm's Estates and Estate Planning Department. His practice encompasses all aspects of estate planning, probate and estate administration, estate litigation and superannuation complaints. He is a committee member of the Melbourne branch of STEP and a member of the LIV Specialist Wills & Estates Study Group.

Andrew O'Bryan, Partner, **Hall & Wilcox** leads his firm's Taxation, Superannuation and Family Business & Wealth management practice groups. He has extensive knowledge of taxation and commercial practice on many aspects of business including business succession and estate planning. Andrew draws clients from industry and commerce, publicly listed companies and high-net-worth private business groups.

Peter Pascoe, Barrister, **Victorian Bar** was called to the Victorian Bar in 1998. He has established a wide ranging practice in the areas of wills and estate, superannuation, equity, property, domestic relationship property and commercial law. Prior to 1988, Peter practiced in chartered accounting and as a solicitor. He was also a senior lecturer at Swinburne University and has served as a private secretary to the Commonwealth Attorney-General.

Richard Phillips, Barrister, **Victorian Bar** was called to the English Bar of Lincoln's Inn in 1979. In 1982, he was admitted to the Supreme Court of Victoria and signed the Victorian Bar Roll in 1983. He specialises in the area of wills, estates, probate, testator's family maintenance (TFM), trusts, equity and property law. He has significant trial experience in contested wills and TFM cases. Richard is an Accredited Advanced Mediator by the Victorian Bar and has conducted many successful mediations. He is the co-author of *LexisNexis' Wills, Probate and Administrative Service Victoria* and has presented at many conferences and seminars.

Carolyn Sparke, Barrister, **Victorian Bar** has an extensive practice in commercial work, specialising in equity, trusts and deceased estates. She also practices in Guardianship work and is a representative on the VCAT Guardianship List users committee. She is an accredited mediator and the author of numerous publications including the *LexisNexis' Wills, Probate and Administrative Service Victoria*. Carolyn is an advocacy instructor and a regular presenter at seminars.

WHO SHOULD ATTEND?

- Legal Practitioners in a wills, probate or estate planning practice
- Estate Planners
- Financial Planners and Advisors
- Trust Administrators
- Tax Advisors working in the area of estate and succession planning

CONFERENCE DATE AND VENUE

20 – 22 February 2008
Stamford Plaza Melbourne
111 Little Collins Street, Melbourne VIC 3000
Tel: (03) 9659 1000
Fax: (03) 03 9659 0999
Web: www.stamford.com.au/spm/

PROGRAM CHANGES

Details regarding this conference were confirmed and correct at the time of printing. LexisNexis reserves the right to cancel or amend the conference details at any time if required.

CANCELLATION

Your registration will be confirmed in writing when full payment is received. We will refund your registration in full less a \$165 administration fee if notification is received in writing by 23 January 2008. If we receive written notification between 24 January 2008 and 6 February 2008 you will receive a 50% refund and conference documents. No cancellation requests will be accepted after 6 February 2008. You may nominate a replacement, however no refund will be issued.

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Tick here if you DO NOT wish to receive information about upcoming events

4 easy ways to register

Phone: 1800 772 772
Fax: (02) 9422 2338
Online: www.lexisnexis.com.au

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

Please complete sections A, B and C

Conference code: **PD0308** ABN: 70 001 002 357

A I would like to register for **6th annual Wills, Succession and Estate Planning Conference**

Early Bird* (expires 18 December 2007)

Standard Price

- | | | |
|--------------------------------------------------------------|-----------------------------|-----------------------------|
| <input type="checkbox"/> Two-day Conference only | \$1704.55 + GST = \$1875.00 | \$1909.09 + GST = \$2100.00 |
| <input type="checkbox"/> Two-day Conference + both workshops | \$2545.45 + GST = \$2800.00 | \$2727.27 + GST = \$3000.00 |
| <input type="checkbox"/> One-day conference# | \$854.55 + GST = \$940.00 | \$950.00 + GST = \$1045.00 |
| <input type="checkbox"/> One workshop only* | | \$500.00 + GST = \$550.00 |
| <input type="checkbox"/> Two workshops only | | \$863.64 + GST = \$950.00 |

If only attending one-day conference, please indicate which day Day One Day Two
*If only attending one workshop, please indicate which workshop Workshop A Workshop B

CONFERENCE RESOURCES

- I am unable to attend but would like to purchase a set of conference papers for 6th Annual Wills, Succession and Estate Planning Conference \$300 + GST = \$330

TEAM DISCOUNTS*

Register a team of 3 for the 6th Annual Wills, Succession and Estate Planning Conference at the same time, from the same organisation and receive a free pass for the 4th delegate.

* Early Bird, team discounts and any other discount cannot be taken concurrently

I would like to purchase a copy of*:

- Construction of Wills in Australia** (1st edition), Haines D M for \$165 inc GST (ISBN: 9780409320954 - softcover)
- Wills Probate and Administration Service Victoria**, Collins, K; Phillips, R; Sparke, Carolyn; Boaden, R for \$641.30 inc GST (includes updates for 12 months) (Product Code 915521 - looseleaf)
- Succession Law in South Australia** (1st edition), Haines D M for \$135 inc GST (ISBN: 9780409319149 - softcover)

*Prices of books were correct at the time of printing. LexisNexis reserves the rights to amend the prices at any time if required.

B **Payment details** Payment is due upon registration

- Enclosed is my cheque for \$ _____ made payable to LexisNexis
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Please charge \$ _____ to Mastercard Visa Amex
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Expiry ____/____
Name of cardholder _____
Signature of cardholder _____
- Charge to my LexisNexis account: \$ _____
Account number _____
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C **Delegate details** (for additional delegates please photocopy form)

Mr/Ms/Dr _____
First name Last name

Position _____

Organisation _____

Postal address _____

Suburb Postcode State

Telephone _____

Fax _____

Email _____

YES! I would like to receive information on upcoming events via email