

Registration Form / Tax Invoice

CRICOS Provider No: 00098G

ABN: 57 195 873 179

I would like to attend

Title Mr/Mrs/Miss/Ms:

First Name: _____

Last Name: _____

Firm/Organisation: _____

Occupation: _____

Address: _____

_____ Postcode: _____

Telephone: _____

Fax: _____

Email: _____

Wills & Estate Administration Update

Thursday 5 March 2009

8.30am–1.00pm

Grace Hotel, 77 York Street, Sydney

Course cost includes tuition, materials and refreshments \$352

I cannot attend but please provide the papers \$165

Total Price includes GST **Total \$**

Payment Options

I enclose a cheque **payable to "CLE, UNSW"**,

or Payment by credit card Mastercard Visa

We do not accept American Express

Card number: _____ / _____ / _____ / _____

Expiry date: _____ / _____

Cardholder's name: _____

Signature: _____

Please return this registration form with your payment to:

**CLE,
Faculty of Law,
UNSW, Sydney
NSW 2052.**

Tel: (02) 9385 2267 or (02) 9385 2195

Fax: (02) 9385 1155 or (02) 9385 1778

Email: cle@unsw.edu.au

Website: www.cle.unsw.edu.au

Programme Variation: The Director of CLE retains the right to vary the programme to deal with unforeseen circumstances. This includes cancelling or re-scheduling a programme and changing speakers or content if occasion obliges us to do so.

Cancellation Policy: Cancellations will be accepted up to two weeks prior to the commencement of the course. Withdrawal after this time and before the commencement of the course will result in a cancellation charge of \$100. Cancellations after the commencement of the course will not be eligible for a refund.

Privacy note: The information you have provided on this form will only be used by UNSW to distribute information about University courses and activities to you.

Office Use Only:

Rec'd

Inv No.

Auth No.

Printed on recycled paper



Mixed Sources
Product group from well-managed
forests, and other controlled sources
www.fsc.org Cert no. SCS-COC-00787
© 1996 Forest Stewardship Council



THE UNIVERSITY OF
NEW SOUTH WALES

FACULTY OF LAW
CONTINUING LEGAL EDUCATION

CLE/CPD

Wills & Estate Administration Update

Thursday 5 March 2009

8.30am–1.00pm

Grace Hotel, 77 York Street
Sydney

www.cle.unsw.edu.au

Audience

- Wills & Estates practitioners
- Probate Lawyers & staff
- General Practitioners
- Commercial Lawyers
- Trustee Company lawyers & advisors
- Financial planners & Accountants
- Accredited Wills and estates lawyers

Objective

This seminar will explore the legal issues and disputes that arise in will making and interpretation and estate administration. Testamentary intentions are given effect by a will but can be subject to benign interference by the courts on application of interested parties. The role of executor can also be onerous. This seminar will explore the process of Estate Administration from the point of view of the Executor and the beneficiaries who each have their own interests to pursue.

The increasing importance of the intergenerational transfer of assets needs careful supervision especially at times of economic stress, such as now, to ensure the stated desires of the testator are realized with the least possible intra beneficiaries squabbling.

Recent and relevant cases and legislation in the area will be reviewed.

CLE/CPD Points: Four (4)

About CLE/CPD

The CLE/CPD programme is an important link between the Law School at UNSW and the professional community. The programme consists of a series of quality short courses assisting lawyers, accountants, financial planners, executives and other professionals whose work demands up-to-date knowledge of, and skills in, the relevant areas.

Wills & Estate Administration Update

Thursday 5 March 2009

8.30am Chair: Professor Prue VINES

Faculty of Law, UNSW

Introduction and welcome

Opening Remarks and commentary

Hon Justice George PALMER

Supreme Court of New South Wales

8.50am

Topic 1: Beneficiaries and Estate Administration

Speaker: John ARMFIELD, Barrister, Second Floor

Wentworth Chambers

- General duties owed by executors and administrators
- Rights to call for accounts
- Commission

9.35am

Topic 2: Update on cases in Estate Administration and Testamentary matters

Speaker: Richard NEAL, Partner

Teece Hodgson & Ward

10.20am

Topic 3: Estate Planning for high net worth clients

Speaker: Stephen CORDELL, Consultant

Holding Redlich

- Taking instructions and devising a strategy
- Testamentary trusts

- Succession planning for entities controlled but not owned by client
- Superannuation
- Inter vivos issues

11.05am Morning Tea

11.20am

Topic 4: Executors perspective on Estate Administration

Speaker: Michael WILLMOTT SC

St James Hall Chambers

- General duties of executors and administrators
- Obligation to keep accounts
- Commission
- How executor or administrator can protect themselves (Judicial Advice, Construction Suits)
- Administration Suits

12.10pm

Topic 5: Taxation considerations in Estate Administration

Speaker: Julian SVEHLA, Barrister

Blackstone Chambers

- Overview of issues that arise in testamentary context

12.55-1pm Questions – Close

For more information visit our website: www.cle.unsw.edu.au