Registration Form / Tax Invoice
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Wills & Estates Update
- Important changes in Estate Planning
Tuesday 2 August 2016 • 8.45am – 1.00pm
UNSW CBD Campus, Level 6, 1 O'Connell St Sydney
Course cost includes tuition, materials and refreshments $440
I cannot attend please provide the papers cost $165

Wills, Powers of Attorney and Guardianship
Thursday 4 August 2016 • 8.45am – 12.15pm
UNSW CBD Campus, Level 6, 1 O'Connell Street, Sydney
Course cost includes tuition, materials and refreshments $440
I cannot attend please provide the papers cost $165

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
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.

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Important changes in Estate Planning  
Tuesday 2 August 2016 - 8.45am–1.00pm  
UNSW CBD Campus, Level 6, 1 O’Connell Street, Sydney

8.45am: Welcome & Introduction  
Chair: Mr Phillip McGowan, Director, De Groot Wills & Estates Lawyers

8.55am:  
Topic 1: Understanding the roles and responsibilities in the Estate Planning Process  
Speaker: Stephen GODDING, Consultant, Kemp Strang  
- Understanding the elements in Estate planning,  
- Roles of Planner, Tax adviser and Lawyer,  
- Vehicles for the Estate Planning practitioners  
- joint tenancy  
- Wills  
- Discretionary Trusts  
- Testamentary Trusts  
- superannuation proceeds trust for minors  
- Superannuation – Benefit nominations and reversionary pensions  
- Case study: Estate Plan for business owners

9.50am:  
Topic 2: Budgeting for Budget 2016  
Speaker: Peter BOBBIN, Principal, Argyle Lawyers  
- Super is now limited, what structures will rise up in its place?  
- How to prepare for budget 16 has opened up new super death taxes  
- Tailoring Testamentary Family Trusts to address Budget 16 inequalities.  
- Where powers of attorney need to be modified

10.45am: Morning Tea

11.05am:  
Topic 3: Executors duties powers and responsibilities in execution of estate plan  
Speaker: Margaret PRINGLE, Barrister, Chalfont Chambers  
- Source of the Executors powers  
- Risks of being the Executor as the estate plan is put into action  
- Taking on the role of Trustee of Testamentary Family Trust  
- Duties in relation to reporting to beneficiaries  
- Duty to account – duty to be even handed between beneficiaries  
- relevant form of estates accounts  
- financial description of what happens to inventory of assets  
- after acquired assets  
- Executors decisions when acting as Trustee  
- choices between conflicts of interest  
- conflicts between income and capital  
- maintenance of house and Life tenancies

12.00am:  
Topic 4: Social Security and eligibility for benefits and pensions  
Speaker: Prof Bob DEUTSCH, UNSW, School of Business Law and Tax  
- Carers pensions  
- Age pensions  
- Superannuation changes and responses  
- Effect of loss of capacity  
- Role of financial and legal advisors for extended family and in blended families

12.50pm–1.00pm Q&A and Close

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