Title Mr/Mrs/Miss/Ms: ____________________________

First Name: ____________________________

Last Name: ____________________________

Firm/Organisation: ____________________________

Occupation: ____________________________

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PROGRAMME

Wills and Estates: Masterclass

Thursday 12th March 2015

8.50am – 1.10pm

Grace Hotel, 77 York Street, Sydney

Course cost includes tuition, materials and refreshments $440

I cannot attend please provide the papers cost $165

Register on-line at www.cle.unsw.edu.au

PAYMENT OPTIONS

Payment Options (We do not accept American Express)

☐ I enclose a cheque payable to “CLE, UNSW”,

or Payment by credit card ☐ Mastercard ☐ Visa

Card number: ____________________________

Expiry date: __________

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Please return this registration form with your payment to:

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Sydney NSW 2052 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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Rec’d Inv No. Auth No.
Wills and Estates: Masterclass

Thursday 12th March 2015 | 8.50am – 1.10pm | Grace Hotel, 77 York St Sydney

Audience
Wills & Estates practitioners
Probate Lawyers & staff
General Practitioners
Commercial Lawyers
Trustee Company lawyers & advisors
Financial planners & Accountants

Objective
This seminar will examine some of the key aspects of the practice of Succession Law in New South Wales and Australia. This area of legal services has been raised in importance by asset values and statutory alternatives to testamentary wishes. The community’s need for good representation in this area cannot be overestimated. Consequently this seminar will be of great interest to any legal practitioner working in Wills and Estates. Speakers will provide insights into this jurisdiction. We explore cases, procedures and the statutory framework of the jurisdiction.

CLE/CPD Points: Four (4)

About CLE
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.

8.50am Introduction from Chair
Chair: Jeremy GLASS, Partner, Glass Goodwin

9.05am Opening Commentary
The Hon. Justice Paul Le Gay BRERETON AM RFD, Supreme Court of New South Wales

9.35am
Topic 1: Taking instructions for wills: The neurobiology of a client’s deliberation and decision-making process
Speaker: Hayley BENNETT, Barrister,
12 Wentworth Selborne Chambers
• Conscious and unconscious processes involved in deliberation
• The neuroscience of decision-making: on what information does the brain rely?
• The role of emotion in the testamentary context
• Implications for practitioners: best practice in taking instructions and interviewing clients who are in the process of making a will

10.25am
Topic 2: Taking and recording instructions
Speakers: David LIEBHOLD, Barrister,
13 Wentworth Selborne Chambers and
Dr Tuly ROSENFIELD, Associate Professor,
UNSW Faculty of Medicine, and Medico-Legal Consultant in Geriatric Medicine
• Retention of file notes and other evidence
• Capacity
• Will drafting and construction

11.15 am Morning Tea

11.30am
Topic 3: Grants of Probate and Administration
Speaker: John ARMFIELD, Barrister,
Ground Floor, Wentworth Chambers
• Grant in Common Form
• Grant in Solemn form
• Special Grants
• Appropriate circumstances in which to seek each grant
• Evidence
• Procedural insights

12.20pm
Topic 4: Management of an estate before death and in the lead up to death – has the point of death now become “blurred”?
Speaker: Richard NEAL, Partner,
Teece Hodgson & Ward Solicitors and Accredited Specialist, Wills & Estates
Consideration of cases:
• Ability One Financial Management Pty Limited v JB by his tutor AB [2014] NSWSC 245
• Re Managed Estates Remuneration Report [2014] NSWSC 1652
• LVL [2014] NSWSC 1686
• WvH [2014] NSWSC 1696

1.10pm Q & A and Close

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