



The College of Law

WILLS & ESTATES SEMINARS IN FEBRUARY/MARCH 2010

If you practice in the area of wills and estates, these seminars are ideal for you!

HANDS ON APPROACH TO DRAFTING & CHALLENGING WILLS

Tuesday 23 February 2010 (10016)
2pm-4.15pm

College of Law City, Level 7,
111 Elizabeth St, Sydney

This program is full of tips and practical examples to assist with drafting wills.

The presenters will address a number of complex issues, including relevant judicial decisions, instructions and much more.

presented by:

Anthea Kennedy

Partner, Teece Hodgson & Ward,
Accredited Specialist - Wills and Estates

and

Philip Hallen SC

Thirteen Floor Selborne/Wentworth
Chambers

THE ESSENTIAL GUIDE TO CHALLENGING A WILL

Friday 5 March 2010: 9am-4.30pm (10003.5)

College of Law City, Level 7,
111 Elizabeth St, Sydney

This will be a valuable seminar for all practitioners who are called upon by their clients to challenge a Will. **Maria Tzannes** will lead you through the principles and procedures for challenging Wills under the *Succession Act*. Don't miss this.

CONTESTING WILLS UNDER THE SUCCESSION ACT

- ▶ Testamentary capacity
- ▶ Testamentary intention
- ▶ Fraud
- ▶ Undue influence
- ▶ Lodging of caveats against grant of probate
- ▶ Procedure for grants in solemn form

CONTESTING THE ADEQUACY OF PROVISIONS MADE IN A VALID WILL

- ▶ Time limits
- ▶ Categories of eligible applicants
- ▶ Need for provision
- ▶ Factors warranting provision
- ▶ Disentitling conduct of applicant
- ▶ Notional estate

presented by: **Maria Tzannes** Consultant Solicitor,
former Lecturer and Barrister

PRACTICAL ASPECTS OF WILLS AND ESTATES PRACTICE

Thursday 11 March 2010: 9am-12.15pm (10035)

College of Law City, Level 7, 111 Elizabeth St, Sydney

Join our team of experienced practitioners for a refresher on a variety of critical aspects of succession law.

chair: **Darryl Browne** Partner, Browne Linkenbach Legal Services

speakers:

Paul Evans Solicitor, Accredited Specialist Wills & Estates Law, Manager Estate Planning, National Australia Trustees, NAB Private Wealth, National Australia Bank

PLANNING FOR ADVANCED CARE - ASSISTING CLIENTS TO PREPARE FOR A LONG LIFE:

- ▶ Assessing capacity for Wills, Enduring Powers of Attorney, Guardianship Nominations and Advance Health Directives;
- ▶ Factoring in the consequences of illness or advancing age;
- ▶ Understanding the need for an Enduring Power of Attorney and a Guardianship nomination;
- ▶ Advanced Health Directives: Are these legal?
- ▶ Drafting Wills with options for the appointment of substitute executors; and
- ▶ Drafting tips for flexibility with life estates in Wills to take account of changes in the life tenant's circumstances

Kim Morrissey William Deane Chambers

FAMILY PROVISION CLAIMS AND THE IMPACT ON PROCEDURE OF PRACTICE NOTE SC 7

Mark Sneddon 13th Floor St James' Hall Chambers

TESTAMENTARY CAPACITY: PRINCIPLES, PRACTICE AND PROCEDURE

More seminars on following page

ORDER FORM/TAX INVOICE ABN 32 001 040 651

Return to: The Order Department, The College of Law City
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Please register me for the following seminar(s) - or register online at www.collaw.edu.au

	L/Soc. Member	Non Member
<input type="checkbox"/> 10016 Drafting & Challenging Wills (2 MCLE units) Tuesday 23 February 2010: 2pm-4.15pm, College of Law City	\$160.00 (incl \$14.54 GST)	\$196.00 (incl. \$17.80 GST)
<input type="checkbox"/> 10003.5 Guide to Challenging a Will (6 MCLE units) Friday 5 March 2010: 9am-4.30pm, College of Law City	\$407.00 (incl \$37.00 GST)	\$495.00 (incl. \$45.00 GST)
<input type="checkbox"/> 10035 Wills and Estates Practice (3 MCLE unit) Thursday 11 March 2010: 9am-12.15pm, College of Law City	\$249.00 (incl \$22.60 GST)	\$299.00 (incl. \$27.17 GST)

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This document will be a tax invoice for GST when fully completed and you make a payment that is under \$1000. Please take a photocopy for your records.



WILLS & ESTATES SEMINARS IN FEBRUARY/MARCH 2010 CONTD

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13TH FLOOR SERIES:

IMPLICATIONS OF THE AMENDMENTS TO THE SUCCESSION ACT 2006

Thursday 11 March 2010: 5.30pm-7pm (10033.2)

College of Law City, Level 7, 111 Elizabeth St, Sydney

WHAT IMPACT HAVE THE REFORMS HAD ON FAMILY PROVISION LITIGATION?

The second seminar in our 13th Floor series, expert speaker **Michael Meek SC** examines issues arising from the new provisions - have the reforms addressed the issues they sought to resolve?

presented by: **Michael Meek SC**

Michael was admitted to the New South Wales Bar in 1992 and appointed Senior Counsel in 2009. He practises in a broad range of areas but has a special interest in practice and procedure. Michael is a member of the Commercial Law Association of Australia.

CHANGES TO INTESTACY LAW

Wednesday 17 March 2010: 2pm-3.30pm (10044)

College of Law City, Level 7, 111 Elizabeth St, Sydney

With over 50% of persons not having a will, new legislation determining the distribution of the estates of persons dying intestate will be of importance to all practitioners dealing with deceased estates. The *Succession Amendment (Intestacy) Bill 2009* will see the pool of persons able to inherit increased; children will be excluded from inheriting in many cases and multiple spouses may inherit. In this seminar **Dr Stephen Janes** will review the new legislation and discuss how the changes are likely to be interpreted and applied.

presented by: **Dr Stephen Janes** University of Western Sydney

Dr Stephen Janes BEc LLB (Hons) PhD (Syd) was admitted as a Barrister in 1991 and practised in Commercial, Equity and Succession Law having previously practised as a Solicitor. In 2005 Dr Janes was awarded a PhD by the University of Sydney for a thesis on an aspect of Succession Law. He is also Senior Lecturer in Law at the University of Western Sydney lecturing in Wills and Succession and Commercial Law.

EMERGING TRENDS IN MODERN ESTATE PLANNING

Monday 22 March 2010: 2pm-4pm (10049)

College of Law City, Level 7, 111 Elizabeth St, Sydney

What does the future hold for the complex area of estate planning? Take a look at some emerging trends in this short seminar presented by a leading expert in this field. The term "estate planning" covers a myriad of topics, including taxation issues, lifetime planning, record keeping, and asset protection.

Highly recommended for anyone involved in wills and estate practice, probate, or financial planning.

presented by: **Mike Fitzpatrick**

Partner, PricewaterhouseCoopers Australia

Michael Fitzpatrick, the founder and principal of Clarendene Estate Planning Lawyers (since 1 September 2008 a business unit of PricewaterhouseCoopers), heads a highly specialised group of lawyers providing sophisticated Estate Planning services chiefly by working in conjunction with Accountants and Financial Planners.

As a lawyer, he has over 32 years of experience in many facets of the law. In 1988, having obtained financial planning qualifications, he commenced an energetic involvement in Financial and Estate Planning.

He participates widely in presenting lectures and papers to professional groups on Estate Planning, Self-Managed Super Funds, Asset Protection and Tax Structuring.

More seminars on following page

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<input type="checkbox"/>	10033.2	Implications of the Amendments to the Succession Act 2006 (1.5 MCLE units)	\$117.00 (incl \$11.00 GST)	\$144.00 (incl. \$13.09 GST)
		Thursday 11 March 2010: 5.30pm-7pm, College of Law City		
<input type="checkbox"/>	10044	Changes to Intestacy Law (1.5 MCLE units)	\$117.00 (incl \$11.00 GST)	\$144.00 (incl. \$13.09 GST)
		Wednesday 17 March 2010: 2pm-3.30pm, College of Law City		
<input type="checkbox"/>	10049	Emerging Trends in Modern Estate Planning (2 MCLE units)	\$160.00 (incl \$14.54 GST)	\$196.00 (incl. \$17.80 GST)
		Monday 22 March 2010: 2pm-4pm, College of Law City		

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Autumn Intensive Sessions

held at Tattersalls Club, 181 Elizabeth Street, Sydney (Note Tattersalls Club dress code)

Monday 29 March 2010 - 9am-10am (10101)

PRACTICE IN CONTESTED PROBATE MATTERS

- ▶ Caveats
- ▶ Probate in Solemn Form
- ▶ Citations
- ▶ Special Grants

speaker: **John Armfield** Second Floor Wentworth Chambers

Monday 29 March 2010 - 10.30am-11.30am (10102)

SUPERANNUATION AND ESTATE PLANNING

- ▶ The role of superannuation in estate planning
- ▶ The types of superannuation funds
- ▶ Where does the super go when a fund member dies?
- ▶ Death benefit nominations - binding, non-binding, non-lapsing?
- ▶ The taxation of superannuation death benefits
- ▶ Self managed superannuation funds and getting the best result

speaker: **Robert Monahan** AET Limited

Monday 29 March 2010 - 12pm-1pm (10103)

ISSUES IN ESTATE ADMINISTRATION

The focus of this session will be on the importance of accurate estate accounting and the entitlement of executors to commission.

speaker: **John Poole** Maurice Buckley, C T Poole & Son

Monday 29 March 2010 - 2pm-3pm (10104)

TIPS AND TRAPS IN WILL DRAFTING

A practical approach to a range of issues.

- ▶ Choice and appointment of executors and trustees
- ▶ Revocation of previous wills
- ▶ Residuary clauses in wills and trusts in wills
- ▶ Remuneration of executors
- ▶ Specific gifts and gifts to charities

speaker: **John Stinson** Diamond Conway Lawyers

Monday 29 March 2010 - 3.30pm-4.30pm (10105)

PLANNING FOR THE NEXT GENERATION WITH TESTAMENTARY TRUSTS

- ▶ What is a testamentary trust
- ▶ Why are they crucial in estate planning
- ▶ Tax and testamentary trusts
- ▶ Testamentary trusts as an asset protection strategy
- ▶ Many forms of testamentary trusts
- ▶ Trust that never ends
- ▶ Examining structuring examples

speaker: **Raymond Lim** Bartier Perry

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<input type="checkbox"/>	10101 Practice in Contested Probate Matters (1 MCLE unit) Monday 29 March 2010: 9am-10am, Tattersalls Club	\$82.00 (incl \$7.45 GST)	\$100.00 (incl. \$9.09 GST)
<input type="checkbox"/>	10102 Superannuation and Estate Planning (1 MCLE unit) Monday 29 March 2010: 10.30am-11.30am, Tattersalls Club	\$82.00 (incl \$7.45 GST)	\$100.00 (incl. \$9.09 GST)
<input type="checkbox"/>	10103 Issues in Estate Administration (1 MCLE unit) Monday 29 March 2010: 12pm-1pm, Tattersalls Club	\$82.00 (incl \$7.45 GST)	\$100.00 (incl. \$9.09 GST)
<input type="checkbox"/>	10104 Tips and Traps in Will Drafting (1 MCLE unit) Monday 29 March 2010: 2pm-3pm, Tattersalls Club	\$82.00 (incl \$7.45 GST)	\$100.00 (incl. \$9.09 GST)
<input type="checkbox"/>	10105 Planning for the Next Generation with Testamentary Trusts (1 MCLE unit) Monday 29 March 2010: 3.30pm-4.30pm, Tattersalls Club	\$82.00 (incl \$7.45 GST)	\$100.00 (incl. \$9.09 GST)

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