View's FPA accredited 2017 Estate planning roadshow

With events in Brisbane, Sydney, Melbourne, Adelaide and Perth the half and full day presentations will be given by key estate planning specialists at View, including Tara Lucke, Patrick Ellwood, Sophie Cohen and Matthew Burgess.

The presentations will be run as 'workshops' and will allow for significant attendee participation, including answering of questions submitted during and ahead of each session.

The day will be split into 2 segments, attendees can register for either or both components.

The topics in the morning segment are as follows:

TOPIC 1: ESTATE PLANNING IN 2017 – WHERE ARE WE AT?

The pace of evolution of all aspects of estate planning has continued to intensify over the last 18 months. This presentation will use case studies to explore all key recent developments including:

- the key estate planning related court decisions over the last 18 months
- taxation and stamp duty changes
- examples of the attitude of the Australian Taxation Office towards various estate planning strategies
- bespoke planning opportunities

TOPIC 2: ENDURING POWERS OF ATTORNEY AND GUARDIANSHIP – EVERYTHING YOU NEED TO KNOW

Arguably, one of the most contentious areas of estate planning relates to enduring powers of attorney and guardianship.

There is an array of issues that must be taken into account in relation to appointing attorneys and guardians.

In this topic we explored some of the key things that advisers must address, including:

- how to structure the appointment of more than one attorney;
- the interrelationship between attorneys, enduring attorneys, guardians, executors and binding death benefit nominations;
- the interplay of these arrangements across state and international borders;
- the role of state government departments; and
- the implications of recent court decisions, including the high court's decision in Stanford.

TOPIC 3: ADVISER FACILITATED ESTATE PLANNING – EVERYTHING YOU NEED TO KNOW TO DELIVER EXCEPTIONAL VALUE

Estate planning is the 'new black' for many advisers. Indeed, adviser facilitated estate planning is one of the very few areas of the law where advisers and clients can work collaboratively and constructively.

View's web-based estate planning platform is widely recognised as the solution of choice by leading advisers.

This session will explore the key ways financial advisers, accountants, risk advisers and other lawyers you can leverage View's platform to radically improve their estate planning offerings – and in turn deliver client solutions that simultaneously create immediately profitable income streams for referrers.

The topics in the afternoon segment are as follows:

TOPIC 4: SUPERANNUATION AND ESTATE PLANNING

- Recent cases regarding death benefit nominations;
- Strategies for death benefit nominations, reversionary pensions and superannuation wills;
- Approaches for aligning superannuation entitlements with wider estate plans; and
- The impact of adjacent areas of the law including enduring powers of attorney, marriage breakdowns and the 'notional estate' provisions that can apply where wills are challenged

TOPIC 5: TESTAMENTARY TRUSTS – BESPOKE PLANNING STRATEGIES

- Structuring testamentary trusts to survive multiple generations;
- 'GST' strategies (ie Generation Skipping Trusts);
- Cascading and master testamentary trusts;
- Using corporate trustees and tailored constitutions; and
- Family boards and family constitutions.

TOPIC 6: I'M A CELEBRITY GET ME OUT OF HERE – ESTATE PLANNING HORROR STORIES OF THE RICH AND FAMOUS

Insights from practical unsuccessful use of estate planning tools by celebrities in their estate planning.

Case studies include:

- Michael Hutchence's international gift and loan back arrangement
- The Rinehart Family and trust vesting tips
- Dame Elizabeth Murdoch's life lessons
- Winston Churchill and keeping it simple
- The Lew Family and 'outlaw' planning
- Michael Wright and the $250K diamond encrusted bass guitar

This activity has been accredited for continuing professional development by the Financial Planning Association of Australia but does not constitute FPA's endorsement of the activity.

Accreditation number 008903 for 6 hours

Session details

Date and time (morning tea and afternoon provided to those attending relevant segment. Lunch will be provided for all attendees – even if only attending one segment)

Morning segment in each location – 8.30am – 11.30pm

Afternoon segment in each location – 12.00pm - 4.00pm

Locations and Dates

The confirmed dates and locations are as follows –

Dates	Location
5 May 2017	Sydney – Karstens, Level 1, 111 Harrington Street, Sydney, NSW
27 April 2017	Brisbane – Karstens, Level 24, 215 Adelaide Street, Brisbane, QLD
12 May 2017	Melbourne - Karstens, 123 Queen Street, Melbourne, VIC
11 May 2017	Adelaide – Karstens, 19 Young Street, Adelaide, SA
8 May 2017	Perth - Ibis, 334 Murray St, Perth WA

RSVP By at least 3 days before the relevant event

Packages

FOR THE MORNING SEGMENT

There is a single price point of $79 per registration (unless there are multiple attendees from your firm, in which case each additional attendee can register for $49 per person).

The registration includes entry to the 3 morning topics of the seminar, refreshments and our latest Inside Stories ebook (which consolidates and arranges by topic every post by View from 2016).

FOR THE AFTERNOON SESSION

There are the following options available (pricing for first attendee of a firm, all remaining attendees from a firm can register for $99 per person, regardless of which package is selected).

Afternoon Package Features	**The Works**	**Business Class**	**Just the Basics**
Registration to attend the entire event (including all inclusions of morning session)	•	•	•
Free entry to one View webinar of your choice from the remaining 2017 webinar series program (in 'Just the Basics' package level for the webinar, see - https://viewlegal.com.au/product-category/events/)	•	•	•
Copy of the presentation slides for both morning and afternoon sessions	•	•	•
Answers provided by a View specialist via email for up to 5 questions raised within 30 days of the seminar on any technical question related to topics covered	•	•	
Edited transcript of the event	•	•	
Secure weblink of the audio and visual seminar recording of each topic	•	•	
Paperback copies of any three books published by View Legal (details here)	•		
An electronic copy of detailed papers to accompany each afternoon topic (around 15,000 words of technical content)	•		
An additional 90-minute interactive webinar presentation exclusively for your firm, at any time prior to 30 November 2017	•		
Price (GST inclusive)	$2,650	$795	$275

Presenters

Matthew Burgess

Profile

Tara Lucke

Profile

Patrick Ellwood

Profile

Sophie Cohen

Profile

Registration

CONTACT DETAILS: GPO Box 681, Brisbane Q 4001 • 1300 843 900 • events@viewlegal.com.au • viewlegal.com.au

Please register me for the 2017 **Estate Planning Roadshow**:

Segments

☐ Morning

Afternoon
- ☐ Just the Basics
- ☐ Business Class
- ☐ The Works

Locations

- ☐ Brisbane – 27 April
- ☐ Perth – 8 May
- ☐ Melbourne – 12 May
- ☐ Sydney – 5 May
- ☐ Adelaide – 11 May

NOTE: Registration to afternoon segment will have access to the entire event (including all inclusions of morning session, even if you choose not to attend in the morning).

☐ Would you like an additional attendee from your firm to register for the following prices per person?

- ☐ $49 - morning segment ....
- ☐ $99 - afternoon segment ....

Personal Details:

Mr/Mrs/Miss/Mr First Name .... Middle Name ....

Last Name .... Preferred Name for nametag (if different from above) ....

Position .... Firm Name ....

Email .... Postal Address ....

.... Mobile ....

Payment Details:

I enclose cheque for $ .... payable to View Legal Pty Ltd.

☐ Visa ☐ MasterCard number

Name on Card .... Expiry Date .... /.....................

Cardholder's Signature ....

Direct Credit to **National Australia Bank Account: BSB 084004 No. 845899839**.

Please quote 'Estate planning roadshow' in the subject line.