irongroup lawyers

7.25 CPD points for Financial Planners
7 CPD hours for Accountants

Comprehensive Estate Planning Workshop

This one day, hands-on workshop has been designed for Advisers who want to help clients put estate plans in place or perhaps just want a more in-depth knowledge of estate planning.

Topics covered include:

- General purpose testamentary trusts - their benefits and how they work
- Special purpose testamentary trusts - tailoring to the client's needs
- Managing Superannuation within an estate plan including SMSF's
- How to deal with non-estate assets including jointly owned assets, insurance and family trusts
- Issues for business owners
- Tax issues associated with estate planning
- Challenges to Wills

Also covered is advice on how to set up an estate planning service including resourcing, implementation & marketing.

At the completion of the workshop you will be able to prepare an estate plan that outlines the client's circumstances, needs and some suggested solutions. This will provide the basis for a comprehensive brief to a lawyer to help facilitate the drafting of Wills and Powers of Attorney for the client.

The workshop is designed to be interactive and participants are invited to bring along their own case studies.

Workshop Details

The Financial Planning Association of Australia has accredited the Irongroup Comprehensive Estate Planning Workshop with 7.25 CPD points. For Accountants, the workshop time is 7 hours, excluding breaks.

When: For latest dates refer www.irongroup.com - see Training section

Where: Irongroup Lawyers, Level 8, 533 Little Lonsdale St. Melbourne

Who should attend: Any Advisers wishing to understand more about estate planning and who want to help their clients put estate plans in place. No prior knowledge required.

Workshop Fee: $1100 inc gst. An Irongroup Estate Planning manual is included in the fee.

Bookings: Book now to reserve your place. Call 03 8621 9000 or email training@irongroup.com