



## 2 Day Workshop: Advanced Estate Planning

This two day course is designed for Advisers who would like to extend on their current estate planning knowledge. We will cover more advanced issues with a focus on managing complicated client scenarios.

It will include practical hands-on sessions where we work through case studies with you to help consolidate your knowledge. Existing "live" case studies from participants will be encouraged.

### Topics covered include:

- Family law issues: managing client concerns
- Farming Families: addressing their particular needs
- Life Interest Trusts: income and capital distribution, adequate maintenance & provision, capital transfers.
- Special Testamentary Gifts: including lapsed gifts, contingent gifts, charitable trusts.
- Managing pre-death advances to children in the Will
- Trust Law: Secret Trusts and non-disclosed inheritance gifts; resulting trusts and rights to property owned by another person
- Other jurisdictions: Dealing with estate assets in other states & countries, recognising overseas Wills.
- Executors: including their right to payment, dealing with the death of an executor
- Taxation: Income tax, CGT, stamp duty & GST issues for estates
- The Client Interview: managing competing and sometimes conflicting needs
- Challenges to Wills: An update on Testator Family Maintenance Claims, testamentary capacity, undue influence. Includes other estate litigation such as 'contracting out' issues, equitable estoppel etc.

If you are looking to enhance your skills in estate planning then this advanced course is the one for you.

### Workshop Details

**When:** TBC. Please register your interest and we will confirm once the dates are finalised.

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

**Who should attend:** Any Advisers wishing to update and enhance their estate planning knowledge..

**Workshop Fee:** \$1650 inc gst.

**Bookings:** Book now to reserve your place. Call 03 8621 9000 or email [training@irongrouplawyers.com](mailto:training@irongrouplawyers.com)