



1 Day Refresher Workshop: Comprehensive Estate Planning

This one day course is designed for those Advisers who have done our Accredited Estate Planning Workshop a while ago but would like to re-visit some of the issues and consolidate their knowledge.

This workshop will include practical hands-on sessions to help you approach clients and then work through different client scenarios. Existing case studies will be welcome.

Topics covered include:

- Explaining to clients how a testamentary trust works.
- Identifying special needs of beneficiaries and understanding when special purpose testamentary trusts can be used. Includes case studies.
- Managing Superannuation & Life Insurance as part of an estate plan
- Issues for farmers and business owners - case studies
- Challenges to Wills - family maintenance claims, capacity and undue influence - recent cases
- Managing a client interview - identifying the key issues and how to brief the lawyers.

It may have been a while since you did our initial workshop and you may feel a little 'rusty' especially if you haven't done much estate planning since then. If so this is the perfect 'refresher' for you.

Workshop Details

When: Friday 30th September from 9am to 4.30pm

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

Who should attend: Any Advisers wishing to refresh prior learning and/or consolidate their knowledge. You will need to have completed the Irongroup Lawyers Comprehensive Estate Planning Workshop.

Workshop Fee: \$550 inc gst.

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