SYMPOSIUM

Succession Law track program

8 March 2024 | 5 hours | 5 CPD points

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63 min

SL PLE PM&BS PS

State of Play: Succession Law updates

Dissect recent crucial decisions such as disentitling conduct and legislative updates, ensuring you stay well informed about the most current developments.

Presenter:
Kirsty Gothard, Barrister, Queensland Bar
Jody Pezet, Barrister, Queensland Bar

Chair:
Scott Whitla, Partner, McCullough Robertson

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56 min

SL

Navigating current risks to avoid pitfalls in Succession Law practice

A practical and hands-on session designed to step delegates through recent risk scenarios and to highlight some trending issues to be wary of in practice.

Presenters:
Leyton Cronk, Senior Risk Solicitor, Lexon Insurance Pte Ltd
Emma-Jane McNicol, Senior Risk Solicitor, Lexon Insurance Pte Ltd

Chair:
Scott Hay-Bartlem, Partner, Cooper Grace Ward

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59 min

SL

Death & Taxes – traps to avoid

Taxation of deceased estates is complex with potential repercussions leading to the executor becoming personally liable to the deceased's outstanding tax. Discover the traps and strategies to sidestep pitfalls when dealing with various aspects such as:

- navigating trust taxation
- managing the tax administration of deceased estates
- dealing with cross-border issues
- selling the deceased's principal place of residence
- planning for succession of businesses
- planning for superannuation payouts

Presenter:
Joanne Casburn, Special Counsel, Hamilton Locke

Chair:
Sonia Smith, Special Counsel, Legal Policy, Queensland Law Society

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53 min

SL PS

Tips from the bar – preparing and presenting evidence in succession

In this practical session, receive tips and guidance on preparing and presenting evidence in Succession Law matters before the court.

Presenter:
Karen Gaston, Barrister, Queensland Bar; Member, Queensland Law Society Succession Law Committee

Chair:
Sharon Sangha, Professional Development Solicitor, Queensland Law Society

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58 min

SL

The bank of mum and dad

A session on loans covering:

- what constitutes a loan
- presumption of gift where money passes from parent to child
- loan repayable on demand – statute of limitations issues
- asset protection – against family law proceedings, against bankruptcy
- strategies to increase asset protection surrounding parent/child loans
- how to deal with loans in the estate plan
- different approaches to appropriate documenting of loans and gifts

Presenter:
Patrick Ellwood, Director, Clover Law Pty Ltd; Member, Queensland Law Society Succession Law Committee

Chair:
Sharon Sangha, Professional Development Solicitor, Queensland Law Society

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