

Adviser training/client information sessions

The private client team at McMahon Clarke Legal specialises in estate planning, structuring, business succession planning, estate administration and estate litigation. We are also available to deliver training sessions and seminars on a broad range of topics related to those areas.

Below is a list of the more popular topics on which we are asked to present:

- Asset protection strategies
- Estate administration for advisers—what advisers need to know about deceased estates
- Bankruptcy Act and recent amendments
- Family provision applications—who can contest an estate and under what circumstances?
- Superannuation and borrowing – how does it work and some tips and traps
- Service trust arrangements—what you need to know to prevent an ATO audit
- Business succession strategies
- Essential estate planning for advisers—crash course in estate planning for advisers
- Buy-sell agreements
- Succession planning strategies for blended families
- Family trusts as an estate planning tool
- Superannuation and estate planning—managing control of superannuation on death and/or disability
- Directors duties
- Succession planning for vulnerable beneficiaries
- Enduring powers of attorney and advance health directives
- Testamentary trusts—all you need to know about testamentary trusts including how they are established and the different types available

If you would like more information on the listed topics, or if a topic of interest to you is not listed, then please contact a member of our private client team.

Training sessions can be tailored to suit the requirements of the attendees. They can be conducted as part of an adviser training day (e.g., professional development day) or as half or full day sessions (this may allow a variety of topics to be covered). You may also prefer to join up with another adviser group for a joint training session.

The above topics may also be of interest to your client group and the presentations can be tailored so they are suitable for client information sessions. These sessions can be conducted on their own or in conjunction with a seminar program conducted by your office.

For more information please contact a member of our private client team.

Sean McMahon (Partner) on 07 3239 2933 or sean.mcmahon@mcmahonclarke.com
Jane Blake (Senior Associate) on 07 3239 2942 or jane.blake@mcmahonclarke.com