

# PROFESSIONAL DEVELOPMENT

10 APRIL 2019

## Terminating Trusts

**Date:**

Wednesday 10 April 2019

**Time:**

5.15pm arrival & registration

5.30pm start

7pm drinks & canapes

**Venue:**

The Naval & Military Air Force  
Club of SA

111 Hutt Street

Adelaide

**Cost:**

\$110 Members

\$140 Young professionals (less  
than 5 years from graduation)

\$175 Others

**CPD:**

1 hour

**Contact:**

Kylie Hender, Secretariat

STEP SA

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- In this session Harry explores the different ways upon which a trust may terminate from the perspective of the trustee and beneficiaries, together with the various administrative and practical processes and taxation aspects in respect of the same. The session will cover different categories of trusts, including superannuation funds, as practitioners in this area might regularly encounter and be asked to advise on.

**WHO SHOULD ATTEND?**

Accountants, Financial Planners and Lawyers who advise trustees and beneficiaries.

**WHAT YOU WILL GAIN**

An understanding of:-

- the ways in which a trust may come to an end
- the continuing obligations upon trustees
- the competing rights of trustees and beneficiaries
- the administrative and practical aspects of terminating
- the taxation aspects of terminating

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# OUR SPEAKERS

## We are STEP

STEP is the worldwide professional association for those advising families across generations. We promote best practice, professional integrity and education to our members. Our members help families plan for their futures: from drafting a will or advising family businesses, to helping international families and protecting vulnerable family members. Today we have 20,000 Members across 96 countries, and a local Chapter to benefit South Australian professionals. Our members include lawyers, accountants, financial planners and other trust and estate specialists.

### Upcoming events:

23/5 AGM (prior to presentation) - all Members welcome

23/5 The Australian Financial Complaints Authority

8/3 Trust Symposium

## SPEAKERS

Harry Patsias (TPE) is a Partner at Wallmans Lawyers in their Taxation and Superannuation team and is also a Chartered Accountant with over 20 years' professional experience.

Harry advises in all areas of Federal and State based taxation law, superannuation law and commercial transactions. He has a broad range of experience and provides specialist advice to a wide variety of private client groups across Australia, as well as accountants, liquidators, lawyers and other professionals.

Harry specialises in managing and resolving contentious issues with Federal and State Taxation authorities. This includes pre-audit risk reviews and taxpayer representation during comprehensive reviews, audits, objections, appeals and mediation of taxation disputes.

## CHAIR

Julie Van der Velde TEP is Principal of VdV Legal, which she founded in 2016. Julie is admitted in South Australia and the High Court of Australia. Julie specialises in taxation law and business succession issues. With over 20 years' experience working with South Australian businesses Julie brings a practical commercial focus to her advices and works with clients to provide tailored solutions to the complexity of real world issues. She was awarded the Tax Institute's SME Chartered Tax Adviser of the year for 2017 and is co-chair of STEP SA.

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