

# STEP AUSTRALIA *NEWSLETTER*

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# WELCOME

## FROM STEP AUSTRALIA CHAIR

**W**elcome to the 15th edition of the quarterly *STEP Australia Newsletter*. STEP in Australia is undergoing an exciting transformation. Our goals for 2021 and beyond are to make STEP the definitive voice in trust and estate planning, to enhance the public profile of STEP and build a larger, more esteemed association of professionals.

### STREAMLINED APPLICATIONS

To make the process of joining STEP as convenient as possible, the membership categories in Australia have been consolidated into two pathways – affiliate and full membership. Affiliate members require only one year of practising experience to join, allowing new and young professionals to become a part of STEP. This change alone has benefited membership in Australia, and it is only the beginning.

### MEMBERSHIP DRIVE

A branch-led ‘member-get-member’ initiative will be taking place over the coming months. All of us will be encouraged by our branch to refer our colleagues to experience STEP by attending branch events and, ultimately, to become a member. With an engaged community of members who are invested in the future of STEP, membership is expected to increase dramatically. This will open up the sharing of ideas as well as collegiate and cross-work opportunities. In fact, your invitation of your colleagues with other professional backgrounds will enhance their knowledge and understanding of your experience in trusts, estates and succession.

### COLLABORATION WITH OTHER INSTITUTIONS

STEP is collaborating with parallel institutions, including CPA Australia, the Institute of Chartered Accountants and the Tax Institute of Australia in the mutual promotion of events. These relationships represent an exciting opportunity to bring STEP to a greater number of accountants, wealth advisors and financial professionals.

### ADVOCACY AND MEDIA OUTREACH

STEP’s advocacy work shapes the laws that affect Australian families – a responsibility that deserves recognition. The redesigned STEP Australia website publishes policy submissions and other advocacy from our branches and members. Additionally, STEP Australia is building a diverse network of media connections and publishing press releases.

To make STEP the definitive voice in trusts, estate planning and succession, STEP needs to be at the forefront of everyone’s mind. With a diverse membership base, healthy network of connections and developing media presence, we are well on our way.

To contribute, contact your local branch to find out how you can help.

With best wishes,  
*Peter Bobbin TEP,*  
*STEP Australia Chair*



### STEP AUSTRALIA CONTACT INFORMATION

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**STEP AUSTRALIA CONFERENCE 2021**

Register now  
[www.step.org/australia2021](http://www.step.org/australia2021)

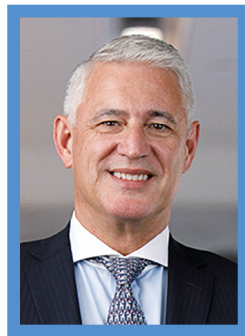
Attend In Person or Virtually!

Monday 8 November to Tuesday 9 November 2021  
Sofitel Sydney Darling Harbour Hotel,  
Australia

# Production of will files in estate litigation: *Grove v Simon Dirk Kenworthy-Groen*

ROD JONES TEP, PARTNER, AND SAM MORPHETT, ASSOCIATE, PIPER ALDERMAN

When deceased estates are litigated, there is often a preliminary dispute about whether the will drafter's file (often including notes of the deceased's instructions and copies of any previous wills) should be disclosed to prospective claimants. In 2021, this question was again considered by the Supreme Court of Western Australia in *Grove v Simon Dirk Kenworthy-Groen (Grove)*.<sup>1</sup>



Some legal practitioners take the view that such documents should be volunteered to assist parties in determining whether a claim actually exists. Other practitioners remain concerned about the deceased client's confidentiality and the legal professional privilege that still attaches to will files after death, and take the view that such requests can be a fishing exercise and should not be released without a court order or subpoena. Before *Grove*, this debate was canvassed in 2018 by the Supreme Court of Victoria in *Re Gardiner (No.3)*<sup>2</sup> and then in 2019 by the Supreme Court of New South Wales in *Re Estates Brooker-Pain and Soulos*.<sup>3</sup>

## RE GARDINER (NO.3)

The applicants were confronted with the court's requirement that an applicant seeking revocation of a grant in its probate jurisdiction must establish a *prima facie* factual case before trial.<sup>4</sup> The applicants' grounds for revocation of the grant of probate was that the deceased lacked testamentary capacity. In doing so, the applicants made submissions upon his health and personal circumstances in and about the time of making and signing his last will in 2015. The totality of those facts was submitted to raise a doubt or demonstrate 'a case for investigation' as to whether the deceased possessed testamentary capacity. This included changes to wills by the deceased in 2008 and 2012.

The applicants submitted that their attempts to obtain information about how the 'chain of wills' came to be made, including requests for copies of the will

files, had been refused, which was not in accordance with the English decision of *Larke v Nugus (Larke)*.<sup>5</sup> They submitted that '[t]he plaintiffs should be required to discharge their burden and satisfy the conscience of the Court that the wills were validly made'.<sup>6</sup> McMillan J addressed the submission but held that this principle did not relate to the issue of the *prima facie* case the applicants needed to put.

The facts and circumstances in *Larke* were considered substantially different from the applicants' position. The applicants here sought to establish a *prima facie* case for revocation on the ground of testamentary incapacity, whereas the plaintiffs in *Larke* were seeking a grant in solemn form against a challenge by the defendants on the grounds of undue influence and lack of knowledge and approval.<sup>7</sup> *Prima facie*, in a case for revocation, the contents of the will files were considered to be of minimal or no relevance to the applicants' ground of testamentary incapacity. As the 2008 will and the 2012 will could not be challenged unless the applicants succeed in revoking the grant of probate of the last will, those files were also of no relevance to the applicants' case.<sup>8</sup>

Further, the *Larke* recommendation by the Law Society of England and Wales (the Law Society) was for a statement of evidence to be provided by the solicitor executor concerning

the execution of the will, not for copies of the entire will files. Considerations of client confidentiality after a client's death were still recognised in the recommendation of the Law Society. In noting this, McMillan J noted that, in Australia, solicitors' confidentiality to a client also continues after the client's death.<sup>9</sup>

## RE ESTATES BROOKER-PAIN AND SOULOS

*Re Gardiner (No.3)* was not cited by Lindsay J in this case but the applicability of *Larke* in Australia continued to be addressed in some further detail.

In respect of *Larke*, Lindsay J noted:<sup>10</sup> '*The Court of Appeal (constituted by Buckley, Shaw and Brandon LJ)*, in a

*'Prima facie, in a case for revocation, the contents of the will files were considered to be of minimal or no relevance to the applicants' ground of testamentary incapacity'*

judgment delivered on 21 February 1979 but only reported in 2000, made the following observations (with editorial adaptation):

“[In principle] when there is litigation about a will, every effort should be made by the executors to avoid costly litigation if that can be avoided and, when there are circumstances of suspicion attending the execution and making of a will, one of the measures which can be taken is to give full and frank information to those who might have an interest in attacking the will as to how the will came to be made.”

Lindsay J noted that the observations in *Larke* were made in response to a recommendation made by the Law Society to solicitors practising in that jurisdiction, first published in its *Gazette* in September 1959<sup>11</sup> and had found its way into Australia via a Queensland Law Society Ethics Centre ‘guidance note’.

Lindsay J noted six possible grounds in concluding that, in his opinion, both the ‘principle’ stated in *Larke* and the ‘practice pointers’ published in the Queensland Law Society guidance note (well intentioned though they were) suffer from impediments to their implementation in practice.<sup>12</sup> Although not mentioned in this judgment, the Queensland Law Society had, in 2018, withdrawn the guidance note, following the decision in *Re Gardiner (No.3)*.

The conflict dispute about whether the will drafter’s file (often including notes of the deceased’s instructions and copies of any previous wills) should be disclosed to prospective claimants was again canvassed in a recent decision of Master Sanderson of the Supreme Court of Western Australia in *Grove*.

William Grove (the Deceased) passed away in October 2015. In his final months, he executed a number of wills, the last of which was made on 11 September 2015 and appointed his son Simon as executor. Probate was granted to Simon in February 2016.

The Deceased had two other sons, John (the Plaintiff) and Andrew (the Defendant). John, Andrew and the Deceased had operated a hotel in partnership. John sought certain documents from Simon and his lawyers to determine whether a claim of undue influence may exist (which would invalidate the last will and conclude in a revocation of probate). Simon refused, and so John issued proceedings seeking pre-action discovery.

The two categories of documents John sought (which were apparently in the possession of Simon’s solicitors), comprised:

- first, two earlier wills of the Deceased known to exist; and
- second, other records of testamentary intention as may appear on the will drafter’s file.

## THE DECISION AND KEY CONSIDERATIONS

Neither *Re Gardiner (No.3)* nor *Re Estates Brooker-Pain and Soulos* was referred to in the judgment of Master Sanderson

‘*Grove* remains an additional reminder of the importance of legal professional privilege with respect to wills and testamentary documents generally’

and it would appear that *Larke* principles were not the subject of submissions.

At the outset, Master Sanderson did comment that the documents in the second category would almost certainly be subject to legal professional privilege, though the position was less clear with respect to the earlier wills.

However, the court noted that the existence of a claim for privilege is not a reason not to refuse an order for pre-action discovery, because any order would only be for discovery, and not production of the actual documents. That is to say, Simon would be required to file only a list of the documents in his control

as executor that fell within those categories, not produce copies of the documents if privileged.

Having made this clear, the main issue to be then argued was whether John could establish that he ‘may’ have a cause of action which would justify pre-action discovery.

Of the various matters identified by John that were said to establish a possible claim against Andrew, the one on which the court appeared to ultimately rely was affidavit evidence from John that Andrew would ‘frequently scream at [his] father’ and that he had a different relationship. That led the court to find that ‘there existed between [the Deceased] and Andrew a volatile and occasionally hostile relationship’.

Although that may not seem a strong basis, the court took the view that it is desirable for potential claimants to have the opportunity to seek access to will files so they can determine whether a *prima facie* action may exist. The earlier wills to ascertain any benefits (or not) to John ‘would [give] a clear idea of whether an action was worth taking’.<sup>13</sup> While the other documents, if not privileged, would enable John to determine the ‘utility in bringing an application to revoke the grant’.<sup>14</sup> This conclusion remains difficult to reconcile with the court’s earlier acknowledgement that the documents would likely be privileged and protected from production in any event.

Neither *Re Gardiner (No.3)* nor *Re Estates Brooker-Pain and Soulos* was referred to in the judgment of Master Sanderson. *Grove* remains an additional reminder of the importance of legal professional privilege with respect to wills and testamentary documents generally. This privilege will (usually) not apply to notes of testamentary intention or similar documents that appear on the file of a non-legal advisor, such as the accountant or financial planner of a deceased will maker. In the absence of a legislative or rules amendment, this tension is likely to be an ongoing aspect of estate litigation. ■

<sup>1</sup> *Grove v Simon Dirk Kenworthy-Groen as executor of the estate of William Grove* [2021] WASC 70  
<sup>2</sup> [2018] VSC 414 per Mc Millan J <sup>3</sup> [2019] NSWSC 671 per Lindsay J <sup>4</sup> Order 11 and *Supreme Court (Administration and Probate) Rules 2014* <sup>5</sup> (1979) 123 SJ 327 (21 February 1979) [2000] WTLR 1033 <sup>6</sup> Above note 2, [108] <sup>7</sup> Above note 2, [118] <sup>8</sup> Above note 2, [119] <sup>9</sup> Above note 2, [120] <sup>10</sup> Above note 3, [83] <sup>11</sup> Above note 3, [84]–[86] <sup>12</sup> Above note 3, [87] <sup>13</sup> *Ibid.*, [6] <sup>14</sup> *Ibid.*, [14]



# The ages and stages of families and families in business

DAVID GIBBS TEP, DIRECTOR, MVA BENNETT, MELBOURNE

The tagline of STEP is ‘Advising families across generations’. This statement presupposes that the advisor can identify their client – the individual or the family group.

In our recent past, succession was often automatically actioned by death or disability – sometimes planned, but often unplanned or unexpected. When the aged pension was introduced in or about the 1900s, the retirement age was 65 for men and 60 for women, and life expectancy for males was 67. No wonder, then, that the government of the day could afford it.

Probate duties led to the testamentary trust, leaving the assets to children and grandchildren and income to the widow/er. Legal and accountancy offices were full of clerks accounting for the testamentary trusts.

Nowadays, the succession conversation and the legal agreements are dealing with a living population. It is starting to be commonplace to have two generations of retirees within an immediate family group. The burning question is whether the technical professions of the law, accountancy and investment advice have caught up with the complexities of dealing with a family rather than an individual (whether dead or alive). The proposition might be that the science of psychology is the dominant skill that is required.

Let us not go back to school to study psychology; let us look at what we already know about the diagnosis of the problem we are trying to solve.



## WHERE IS THE CLIENT ON THE AXIS?

- Business – from start-up through to corporatisation or systemisation to maturity.
- Management – an emerging family business, working with the second generation and ultimately the ‘passing of the baton’.
- Ownership – a founding individual succeeding to siblings and then to cousin consortiums.

## WHERE DOES THE CLIENT SIT IN THE ‘THREE CIRCLE MODEL’?

The Three Circle Model contemplates the combination of business, family and ownership circles, generating clearly delineated areas of focus.

Each circle has a different governance regime and each governance area will have a different set of advisory principles and practices.

Families in business comprise approximately 70 per cent of Australian businesses. There is a view that if a business was to be set up with the best advice available, it would not be set up as a family business. Families and businesses have conflicting systems of operation.

For example:

### FAMILIES

- Emotional
- Obligation based
- Relationship oriented
- Status as birth rite
- Nurture the weakest
- Nepotism

### BUSINESS

- Objective
- Task based
- Task oriented
- Select best person for the job
- Survival of the fittest mentality
- Competences valued

If there are likely to be ‘family wars’, the warning signs will be forever present and worth examining when providing professional advice. Where the warning signs of a family war are entrenched in negativity, it may not be possible to successfully engage.

Look for the following warning signs (attributes):

- perceived unfairness or inequality;
- process disagreement;
- non-consensus;
- privilege;
- factionalism; and
- ambiguity.

To the litigator, these attributes may deliver marketing opportunities, but to the advisor of a family across generations, these attributes are fundamental to the advisor’s advice and strategy. No matter the extent of wise counsel, it may not be possible to resolve or prevent a family war, and separation may be the only sensible solution; divide and conquer.

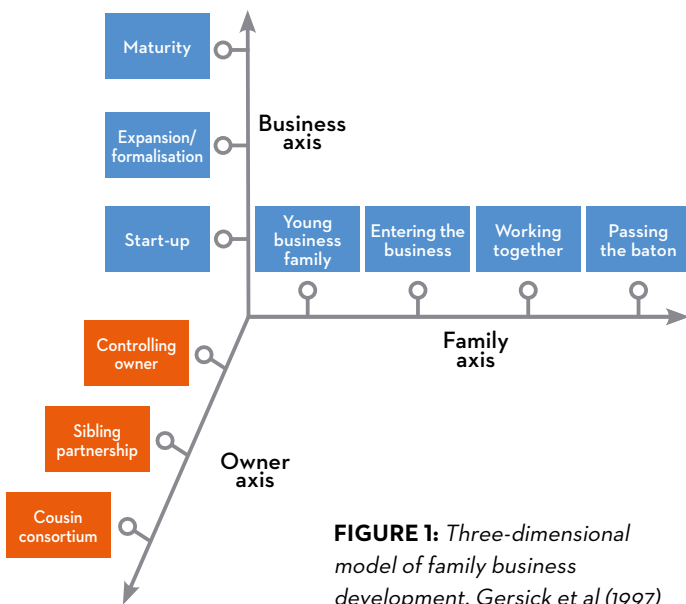


FIGURE 1: Three-dimensional model of family business development, Gersick et al (1997)

**TIME MARCHES ON**

The age range within families is widening; it is unlikely that they will be within the same age range or stage in their development. The advice given to grandparents and their learning strategies will be quite different to teenagers.

For example:

**Launching, aged 19-25: learnings and responsibilities**

- First real job
- Move out of home
- Buy and maintain car
- Obtain credit card – establish credit rating
- Control expenditure against income available
- Concepts of risk and reward
- Basic accounting skills
- Effective time management
- Successful post-secondary education

**Mature living, aged over 65: learnings and responsibilities**

- Enjoying the rewards of life's work
- Service to family as an elder
- Bringing the right perspective and pace to family decision making
- Serving as a catalyst for others
- Support for lifelong learning of others
- Management of personal health issues
- More storytelling about the family
- Enjoying life's rewards

**UNDERSTANDING VALUES**

Many families have strong values. Rarely are the family values documented and referred to in family communications. Rarely are values documented in legal agreements that have been put in place to assist family succession across generations. This article argues that understanding a family's values is key and from where all else flows. Values, once determined, can then be governed. Governance systems will vary depending on the complexity of the tasks required, to uphold the expectations that flow from the values.



**‘Rarely are the family values documented and referred to in family communications. Rarely are values documented in legal agreements that have been put in place to assist family succession across generations’**

Subjecting agreed values to good governance creates resilience. Resilience means being able to flex and bend, and recover from a level of depression and bounce back. The unique attribute of a well-governed family with values will be resilience in the face of life's hurdles.

Advising families across generations can be a tricky business. It is said that you cannot govern a family with a legal agreement. Nevertheless, some advisors advocate a deed of mutual obligations.

Professional advice could include:

**Preparing a will**

- The client is the testator, not the family – do you need to understand the broader family relations?
- Is the document consistent with the family values?
- Is education of successors in place to deliver the testator's wishes?

**Advising on a family dispute**

- Is there a set of common values?
- Are there conflicting systems of operation – i.e., business versus family?
- Is there a dominance of negative attributes that will prevent reconciliation?

**Being a trusted advisor to the family**

- Is the governance system still appropriate as time has marched on?
- Is the family ‘event ready’ – death, disablement, divorce or just opportunity?
- How do you know that all is as it is?

There are many tools in the family advisory toolbox and we may be judged on how well we know our client, and not necessarily on how the tools have been applied.

In conclusion, the professional advisor should consider the values, the age and the stage of their client or family group of clients in their analysis and advice. ■

## MEMBER PROFILES

# Introducing...

## Sarah Walton TEP

Estate Planning Lawyer, ANZ Wealth Legal Services

### WHY DID YOU BECOME A STEP MEMBER?

STEP's reputation for excellence and learning opportunities. I first qualified in the UK, so I was introduced early to the organisation's reputation and worldwide insight.

### WHAT DOES BEING A STEP MEMBER MEAN TO YOU?

It is an affordable way of keeping up-to-date, with seminars that are excellent and on point for my area of practice. It also provides an opportunity to meet and network with professionals in my area.

### WHAT IS YOUR MOST-USED STEP RESOURCE?

Past papers available on the STEP Western Australia website.

### GIVE US SOME INSIGHT INTO YOUR EXPERTISE

I work in estate planning and estate administration.

### WHAT MOTIVATED YOU TO GAIN THE EXPERTISE YOU HAVE TODAY?

I wanted to help clients in a way that matters to them



on a truly personal level.

### WHAT IS THE BEST ADVICE YOU HAVE EVER BEEN GIVEN?

'If I were you, I wouldn't start from there.' It is such a good way of saying, 'Try a different angle'.

### WHAT ISSUES CAN YOU SEE STEP ADDRESSING IN THE FUTURE?

Pursuing updates to the outdated *Administration Act 1903*.

### WHAT IS YOUR MOST MEMORABLE STEP EVENT?

The Christmas party at the Bell Tower. Once the traffic noise disappeared, it was a beautiful night.

### WHAT 'MUST READ' BOOK WOULD YOU RECOMMEND?

*A Fortunate Life* by Albert Facey.

### WHAT DO YOU LOOK FORWARD TO OUTSIDE OF THE OFFICE?

Spending time with my family, catching up with friends and running. ■

## Craig West TEP

CEO and founder, Succession Plus

### WHY DID YOU BECOME A STEP MEMBER?

All the work I do is related to privately owned businesses and succession, and exit planning – this closely aligns with STEP's focus on advising families across generations. Our business is also international and very collaborative and, again, this aligns well.

### WHAT DOES BEING A STEP MEMBER MEAN TO YOU?

STEP allows me to highlight our expertise and experience, as well as networking, connecting with and learning from other members around the world who are dealing with similar issues with similar clients.

### WHAT IS YOUR MOST-USED STEP RESOURCE?

The resource library has been very interesting and contains a lot of very valuable material.

### GIVE US SOME INSIGHT INTO YOUR EXPERTISE

My background is in accounting, though I do very little accounting today. I am currently completing my doctoral studies on using ESOP as a business succession tool.

### WHAT MOTIVATED YOU TO GAIN THE EXPERTISE YOU HAVE TODAY?

I was involved in a very poorly designed and executed succession strategy that failed miserably and personally cost me a lot of money (and drama) – my goal is to make



sure as many business owners as possible avoid that outcome.

### WHAT IS THE BEST ADVICE YOU HAVE EVER BEEN GIVEN?

'Begin with the end in mind' – have a very clear outcome and make sure each step you take is getting you closer to that outcome.

### WHAT ISSUES CAN YOU SEE STEP ADDRESSING IN THE FUTURE?

The exit and succession of baby boomers is the largest transfer of wealth/assets in history and is both a huge opportunity and a huge risk for families in business. Focused, coordinated advice by STEP advisors can make a huge difference.

### WHAT IS YOUR MOST MEMORABLE STEP EVENT?

I am only very new, but I am looking forward to the upcoming conference in Sydney as a means to meet more of the STEP community.

### WHAT 'MUST READ' BOOK WOULD YOU RECOMMEND?

*Walking to Destiny* by Chris Snider – it explains the whys and hows of exit planning.

### WHAT DO YOU LOOK FORWARD TO OUTSIDE OF THE OFFICE?

Watching sport and hanging out with my family: I have two 'boys', aged 25 and 21, whom I am very proud of, and I have been married for 32 years. ■

'STEP is an affordable way of keeping up-to-date, with seminars that are excellent and on point for my area of practice'

**STEP ADVOCACY**

# STEP's work in advocacy

STEP Australia has been a force for positive change in state and national legislation. With the central goal of advocating for the interests and needs of Australian families, it has called attention to many areas of policy that need change. Continuing this vital function and developing it further into the future is central to STEP's mission. To support the development of STEP's advocacy work and bring it to a more public stage, STEP Australia is giving our members a voice.

**ADVOCACY PAGE**

All of STEP's advocacy activity is now publicly available on the STEP Australia website at the brand-new advocacy page, accessible at [www.stepaustralia.com/advocacy-and-policy-submissions-in-australia](http://www.stepaustralia.com/advocacy-and-policy-submissions-in-australia)

Here, you have access to the submissions made by each of the STEP branches (New South Wales, Queensland, South Australia, Tasmania, Victoria and Western Australia), as well as STEP Australia itself, in chronological order, allowing the public, as well as STEP members, to stay up-to-date on the advocacy taking place at STEP across the country. The advocacy work of STEP being available on our own public platform is an important step towards enhancing the influence and reputation of STEP, allowing for a wider, more definitive influence on policy that shapes the lives of Australian families.

**STEP ADVOCACY IN THE MEDIA**

Shaping the laws that affect Australian families is a responsibility that

deserves recognition, and the newly redesigned STEP Australia website publicly publishes policy submissions and other advocacy from the branches. Additionally, STEP Australia is building a diverse network of media connections, creating press releases and bringing awareness of STEP to the national stage. In the coming months, STEP will be reaching out to journalists with newsworthy media releases regarding advocacy and recent STEP activities, building a catalogue of published content in esteemed publications.

To make STEP the definitive voice in trust and estate planning, STEP needs to be at the forefront of everyone's mind. With a diverse membership base, healthy network of connections and developing media presence, we are well on our way.

**MEMBER EVENTS**

## STEP AUSTRALIA EVENTS PROGRAMME

View the full events programme at [www.stepaustralia.com/events](http://www.stepaustralia.com/events)

We welcome all STEP members to attend events hosted by other branches. For more information on the STEP Australia events calendar, contact Dior Locke at [dior.locke@step.org](mailto:dior.locke@step.org)

## SEE MORE ON EVENTS AND KEEP UP-TO-DATE

Keep informed on upcoming STEP events via the following links:

STEP AUSTRALIA EVENTS PROGRAMME: [www.stepaustralia.com/events](http://www.stepaustralia.com/events)

STEP WORLDWIDE EVENTS: [www.step.org/events](http://www.step.org/events)

Register your interest to be a speaker at STEP Australia events by emailing Dior Locke at [dior.locke@step.org](mailto:dior.locke@step.org)

Can't make an event? Many speakers provide a paper for members. Get in contact to find out more.

STEP AUSTRALIA WEBSITE: [www.stepaustralia.com](http://www.stepaustralia.com)  
STEP WORLDWIDE WEBSITE: [www.step.org](http://www.step.org)

## STEP AUSTRALIA WEBSITE

The STEP Australia website has recently undergone a site-wide redesign which brings a revitalised, modern aesthetic to the STEP brand.

On our upgraded site, you will find many new pages, member functions and publicly displayed content, including advocacy, events, conferences, industry news, webinars on demand, national newsletters, the members' Technical Resource Library and international connections.

[www.stepaustralia.com](http://www.stepaustralia.com)

**STEP AUSTRALIA NEWSLETTER SUB-COMMITTEE**

CHAIR: ANDREA OLSSON

COMMITTEE MEMBERS: RACHAEL GRABOVIC, DAVID GIBBS, ROB CUMMING, PAMELA SUTTOR, JONATHAN HAEUSLER, ROD JONES  
THE SUB-COMMITTEE WELCOMES EXPRESSIONS OF INTEREST FROM MEMBERS. PLEASE EMAIL ANY FEEDBACK OR EXPRESSIONS OF INTEREST TO DIOR LOCKE AT [DIOR.LOCKE@STEP.ORG](mailto:DIOR.LOCKE@STEP.ORG)