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EMERGING TEP PROFESSIONALS
28 MARCH 2023

STEP Into Trusts Series
Session 1: Trust Basics - Roles

Date:
Tuesday 28 March 2023

Time:
5:30pm – 6:30pm
Please arrive by 5:15pm to register and collect a drink
Lecture should end by 6:30pm with drinks and canapés to follow.

Venue:
in.Studio + Cafe
268 Pirie Street, Adelaide

Cost:
$60 (incl. GST)
This session is aimed at emerging professionals with less than 5 years post graduation experience
$100 (incl. GST)
Professionals with over 5 years experience
$25 (incl. GST)
Current University Students

CPD:
1 hour

Contact:
Kylie Hender, Secretariat STEP SA
0417 805 314
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GENERAL OVERVIEW
The Emerging TEP Professionals brings together emerging professionals from accounting, law and financial advisory practices with up to 5 years' professional experience to collaborate, share knowledge and experience. The Emerging TEP Professionals aims to build the knowledge of emerging practitioners in the area of trusts and estates. Additionally, we encourage students, clerks, paralegals and junior practitioners to attend, participate and join our sessions.

SERIES SPECIFIC
The Emerging TEP Professionals' STEP Into Trusts series is designed for accountants, lawyers and financial planners wishing to expand their knowledge of trusts and their uses in practice. The series will cover the basics of trusts, their different types and uses, how to account for trusts (including how to interpret a balance sheet) and an overview of how taxation rules apply to trusts. At the end of the series attendees will have a greater understanding of Trusts and their application in practice.

SESSION 1: TRUST BASICS - ROLES
Australia takes its legal foundation from England where trusts have played a significant role for centuries. This seminar will cover the history of trusts, the three certainties and the various office holder responsibilities. This session will also cover the nature of the fiduciary relationship between trustees and beneficiaries as well as the rights of the beneficiaries against a trustee. The differences between the use of a corporate trustee to that of individual trustees will also be discussed.

WHO SHOULD ATTEND?
Emerging professionals practising in accounting, law and financial planning who want to be able to advise trustee clients with an understanding of the tax implications of their advice.

WHAT YOU WILL GAIN
An understanding of the types of trusts, the relationship between trustees and beneficieries and the differences between a corporate or individual trustee.

PLATINUM SPONSOR

Click here to register today.

OUR SPEAKER

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:

10 March - Trusts Symposium

29 March - Keeping assets of a family intact in the event of a divorce

7 June - Change of trustee and insolvency

SPEAKER
Shannon McMenamin is a Wills and Estates Associate at Douglas Hoskins Legal. She completed a double degree in Law and Commerce (International Business), with a Diploma of Languages in French in 2015.

Prior to joining Douglas Hoskins Legal in 2020, Shannon practised in a boutique firm predominantly in Dispute Resolution, and also in Commercial Law and Wills and Estates.

Shannon specialises in estate litigation, and estate planning and administration, and is a member of STEP's Emerging Professionals Committee.

CHAIR
Harry Patsias (TEP) 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.

Click here to register today.