

EMERGING TEP PROFESSIONALS - WILLS & TESTAMENTARY TRUSTS

THURSDAY 9 MAY 2024

Date: 9 May 2024

Time:

5:30pm – 7:30pm

Please arrive by 5:15pm to register and collect a drink

Venue:

College of Law

Level 9, 19 Grenfell Street

Adelaide SA 5000

Cost:

Emerging Professionals : \$60

Other Professionals: \$100

Student: \$25

CPD Type : Professional Skills

CPD Points : 1

Contact:

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STEP SA

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A discretionary testamentary trust will is a valuable estate planning tool that can provide asset protection and tax planning advantages. If used properly, it can help preserve a family's wealth for future generations. Advisors should carefully examine each individual's circumstances as it is not always appropriate to use discretionary testamentary trusts.

This session will provide an overview of the benefits of using discretionary testamentary trusts. It will also examine scenarios where it may or may not be appropriate to incorporate such trusts into a client's estate planning.

WHO SHOULD ATTEND?

Emerging professionals practising in accounting, law and financial planning who want to advise clients on the use of discretionary testamentary trusts in their estate planning.

WHAT YOU WILL GAIN

A deeper understanding of the operation of discretionary testamentary trust wills and how they can be used effectively in estate planning.

[Click here to register today.](#)

OUR SPEAKERS & CHAIR

We are STEP

STEP is the worldwide professional association for Accountants, Financial Planners and Lawyers 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 May - AGM & Bingo

6 June - Getting Money from Inter Vivos Trusts

27 June - Emerging TEP Professionals; Trusts & Taxation

SPEAKERS

FIONA HUYNH

Fiona is an Associate at CCK Lawyers and a member of the Emerging TEP Professionals Committee.

Fiona was admitted to the Supreme Court of South Australia in 2020 and practices in all areas of wills and estates, including drafting wills, powers of attorney, and advance care directives. She assists a range of clients, including high net worth individuals and family groups, with their succession planning and asset protection needs.

Fiona also has substantial experience in the administration of deceased estates and preparing estate administration applications.

CHAIR

MARK TAYLOR

Mark Taylor joined Edmund Barton Chambers in February 2018 after relocating from England.

The majority of Mark's practice now involves trusts, deceased estates and insolvent deceased estates. Mark's areas of practice include probate and estate litigation, executorial advice, insolvency in the estate context and equity and trusts.

In 2018, Mark was awarded the Lindy Powell QC prize for Most Accomplished Bar Reader. In both 2022 and 2023, Mark has been recognised in Doyle's Guide as pre-eminent junior counsel in Wills and Estates Litigation in South Australia. In 2021, Mark was recognised in Doyle's Guide as recommended junior counsel in Wills and Estates Litigation Australia-wide.

[Click here to register today.](#)