

Continuing Professional Education



Estate Planning

Presenter:	Morgan Solomon
Date:	Wednesday 22 April 2015
Time:	7.30am – 9.30am
Venue:	IPA WA Division Training Room Suite 9, 100 Mill Point Rd, South Perth WA
Fee:	Early Bird-Register before 15 April Member \$155.00 Non-Member \$190.00 Regular-Register after 15 April Member \$165.00 Non-Member \$200.00
Includes:	Session notes and Light Breakfast
CPE Hours:	2

Introduction

Estate Planning is much more than a simple will. With the vast changes in the sorts of assets we own and the way we own them, coupled with significant changes in the cultural landscape and family dynamics, what was once simple is now complex.

The rise and use of Discretionary Trusts, Testamentary Trusts, Enduring Powers of Guardianship, Advance Health Directives and Self Managed Super Fund nominations all provide fertile ground for good and effective estate planning.

Topics

- Why Wills are more complex than ever, advances in digital technology and how to advise clients on dealing with digital assets on death
- The essence of a good will and its essential components
- Testamentary Trusts - various types and when and how best to use them including protective trusts and special disability trusts
- Enduring Powers of Guardianship and Advance Health Directives

Learning Objectives

On completion of this seminar attendees will understand why estate planning is complex and how to advise clients on some of the most common pitfalls and traps to avoid in formulating a successful estate plan.

Recommended For

All practitioners

About the presenter

Morgan Solomon, Director – Bowen Buchbinder Vilensky

Morgan is a director of BBV Lawyers and an expert in estate planning. His practice involves both the front end of estate planning, devising and implementing estate plans and creating them, and the back end, in defending and commencing proceedings challenging wills.

He also has broad commercial and property law experience that feeds into much of his work, so that he approaches legal practise with a commercial and practical focus on outcomes and solutions.

Estate Planning

**Date:** Wednesday 22 April 2015**Time:** 7.30am - 9.30am**Venue:** IPA WA Division Training Room, Suite 9, 100 Mill Point Rd, South Perth WARegister on-line at publicaccountants.org.au or complete registration form and return to:

Institute of Public Accountants, Locked Bag 9, South Perth, WA 6951

Ph: 08 9474 1755 Fax: 08 9474 2911

Registration Details

Title _____ IPA Member # _____ Postnom. _____ Non Member

First Name _____ Surname _____

Second Attendee _____

Organisation _____

Postal Address _____ Work Home

Suburb _____ State _____ Postcode _____

Phone # _____ Fax # _____

Email Address _____

Dietary Requirements _____

Payment Details

This document will be a Tax Invoice for GST purposes when you make full payment. Please keep a copy for your records.

Amount Payable	IPA Member	IPA Regional Member*	Non Member
Early Bird	\$155.00	\$116.25	\$190.00 (Registration Fee includes GST)
Regular	\$165.00	\$123.75	\$200.00 (Registration Fee includes GST)

**Regional Members - All regional members located 200kms from Perth are entitled to a 25% discount on the registration fee.*

Payment Method

Cheque Please find enclosed my cheque payable to 'Institute of Public Accountants' for: \$ _____Credit Card Please debit my credit card the sum of: \$ _____Card type MasterCard Visa American Express

Card Number _____ Exp. Date _____ / _____

Cardholder Name _____ Signature _____

Privacy Statement The Institute of Public Accountants (IPA) acknowledges the importance of privacy and of safeguarding personal information. Any personal details provided to the IPA will be protected in line with the National Privacy Principles and the laws and regulations regarding such matters as are applicable in Australia. The IPA will not collect or monitor any personal information about you without your consent nor will it use or disclose to others your personal details without prior authorisation unless: it is required by the law or the courts; it is necessary because of the service you are using or for a service you have requested; to protect the rights or property of others. The information is being gathered to process your registration, you may withhold providing the information but this will make processing your registration difficult. The information requested is intended only for the use of the IPA and our approved service providers.

Cancellation Policy Cancellations must be advised in writing at least 6 working days prior to the activity date. Transfers out of a course are viewed as a cancellation and an administrative fee of 10% to a minimum of \$27.50 (incl GST) will be incurred for cancellations. A refund will not be granted if a registrant fails to attend an activity or cancels within 5 working days prior to the activity. Course materials will be sent to registrants who cancel in the non-refund penalty period. Substitutions can be made at any time without penalty. The IPA cancels seminars only when absolutely necessary, but reserves the right to do so, as well as to reschedule seminars and substitute presenters. If a course is cancelled, you may request a transfer to another course, a credit, or full refund. Please note the IPA will not be held liable for any accommodation or associated travel costs should a seminar be cancelled or rescheduled.