

## **Registration Open 8:30**

### **9:00 - 9:45 Topic 1: Estate planning and asset protection**

For many clients, protecting their wealth for and from future generations is a key issue. This session will focus on estate planning issues that need to be considered to ensure assets are protected from family disputes, including spendthrift beneficiaries and creditors.

### **9:45 - 10:30 Topic 2: Estate planning for related entities - lessons from Rinehart and Wright cases**

The recent sagas between Gina Rinehart and her children and Peter Wright and his estranged daughter highlight how any estate planning and business succession exercises can potentially result in years of protracted litigation and the complete breakdown of a family relationship.

This session will provide practical insights into the estate planning process where trusts and companies are involved by methodically tracing the lessons we can learn from the Rinehart and Wright matters.

## **Morning Tea 10:30 - 11:00**

### **11:00 - 11:45 Topic 3: Post-death estate planning strategies**

Generally a comprehensive estate plan must be implemented well before a person dies or loses capacity. There are some exceptions to this rule and with the ageing population, it is vital for all advisers to be aware of the main strategies available.

### **11:45 - 12:30 Topic 4: Estate planning for superannuation**

This sessional will provide an insight into the key strategies for managing a superannuation as part of a comprehensive estate plan, including:

## **Lunch (optional) 12:30 - 1:15**