

Advanced Workshop:

Asset Protection – doing it legally

You can use trusts and even offshore structures to stave off attacks and still comply with ATO rules.

Asset protection adopts advanced estate planning and business succession planning techniques. It puts your assets beyond the reach of predatory creditors, business partners, spouses and in-laws.

We look at the special needs of professionals such as doctors and sole proprietors with plant and equipment and intellectual property.

Your employees, spouse and business partners can bring you down. We show you how to stop this.

How do I:

1. remain legal and transparent for the Australian Taxation Office?
2. stop my mistress from challenging my estate?
3. protect my assets from my daughter-in-law?
4. help my daughter buy a house with her husband but get it all back if their marriage doesn't work?
5. escape litigation charges and going to court? Avoiding the predator plaintiffs.
6. build a wall between **risky/worthless** business assets (e.g. employees, advice, risk) and **passive/valuable** business assets (e.g. business name, goodwill, client base, property, cash flow, cash)?

“This course is designed for Accountants, Financial Planners and Lawyers who are already skilled in Estate Planning, Tax or Business Succession Planning. This opens up a new area of practice and profit source.” - Brett Davies

Seminar Information

Date: Thursday, 9 September 2010

Time: 7.00 for 7.30 – 9.30 am
(Breakfast included)

Venue: Queensland Club, 19 George Street, Brisbane

Investment: \$380 per person

Registration: Return the Registration Form by fax to **(08) 9325 5999** or email Caitlin@taxlawyers.com.au

Presenter

Brett Davies

FTIA, B Juris, LLB, LLM,
BA(Hons), DipEd, MBA

Brett Davies Lawyers



Hands on and practical, Brett is the Principal at Brett Davies Lawyers. He has over 21 years experience in the specialised fields of Tax, Superannuation and Estate Planning. Brett is a highly sought after lecturer and author for various bodies in the financial services industry.

Brett provides practical guidance on the latest opportunities for Asset Protection and the strategic applications for Accountants and Advisers.

Brett Davies Lawyers

Specialising in Taxation and Superannuation, Brett Davies Lawyers is one of Australia's leading law firms in providing advice for Accountants, Advisers and Lawyers.

Gen Y Essentials

4 Entry level lessons on the fundamentals of Modern Relationships, Estate Planning, Business Structures and Asset Protection

Lesson 1: Let's talk about Sex (without regrets)

Status: Ball and chain, living in sin, D.I.N.K's, same sex, bigamist, mistress / playboy (sex buddies), house mates or "just friends"?

Kids? Children, blended families, adoption, sperm donation and collecting semen from dead husband.

What protection to use:

- Buy a house with friends agreement
- Cohabitation or Pre-nuptial agreement?
- Child Maintenance Trust
- Will – 3G Testamentary Trusts v's Super Testamentary Trusts

Lesson 2: Where there's a Will...there's a way

- What assets don't get into a Will?
- Different ways to hold Assets.
- Thinking about marriage? – Contemplation of marriage clauses v's Wills.
- Children? – Disaster and guardianship clauses v's Protective Trusts.
- Powers of Attorney

Lesson 3: Mind your own Business Structure

- Best business structures after Bamford, Richstar and Dr Spry's case.
- Vigorous debate on the pros and cons of each business structure: Family Trust, Partnership, Company, Unit Trust, Hybrid Discretionary Trust and Property Trust.

Lesson 4: Going Bankrupt & Staying Rich

- Learning from other generations – Hey Bondy!
- Do you need (asset) protection?
- What happens when your piggy bank is empty?
- "Man of Straw" and "Woman of Substance" – it's traditional but it works.
- Non retirement benefits of Superannuation – a secret piggy bank.
- Dissecting the three safe harbours in light of the new bankruptcy laws.

Seminar Information

Date: Thursday, 9 September 2010

Time: 9.15 for 9.30 am – 2.00 pm
(Lunch included)

Venue: Queensland Club, 19 George Street, Brisbane

Investment: \$550 per person

Registration: Return the Registration Form by fax to
(08) 9325 5999 or email

Caitlin@taxlawyers.com.au

Presenter

Michael Crowe

LLB B.Com
Solicitor,
Brett Davies Lawyers



Michael completed his joint law and commerce degree with the University of Western Australia. Specialising in the taxation implications of Estate Planning, Michael guides clients through the complexities of the two certainties in life – Death and Taxes!

Michael believes that every client's situation is unique, and enjoys the challenge of developing the best strategy for each client.

"To stay relevant, Accountants and Advisers need to know about modern relationships. The next generation is coming and they have a whole new set of needs!"

– Michael Crowe

Brett Davies Lawyers National Roadshow



Brett Davies LAWYERS

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Registration Form / Tax Invoice

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<p>Session A:</p> <p>Asset Protection – Doing it Legally Presented by Brett Davies</p> <p>Date: Thursday, 9 September 2010 Time: 7.30 – 9.00 am Venue: Queensland Club, 19 George Street, Brisbane Price: \$380 per person</p> <p>Includes Breakfast</p>	<p>Session B:</p> <p>The Gen Y Essentials Presented by Michael Crowe</p> <p>Date: Thursday, 9 September 2010 Time: 9.30 am – 2:00 pm Venue: Queensland Club, 19 George Street, Brisbane Price: \$550 per person</p> <p>Includes Lunch (Please note Business Dress standard for dining at the Queensland Club)</p>
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Attendee Details:

Name		Position	
Company		Email	
Telephone		Facsimile	

I would like to attend: Asset Protection - \$380 Gen Y Essentials - \$550 Both - \$800

RSVP: Fax to **(08) 9325 5999** or email Caitlin@taxlawyers.com.au

Payment Details:

Direct Deposit - Brett Davies Lawyers / BSB: 086-006 / Account Number: 82-646-6157
Please quote our reference: "BrisSem [Your Name]"

Cheque attached (make payable to "Brett Davies Lawyers")

Please debit my **Credit/Debit card** Visa / MasterCard the amount of \$_____

Card Number: _____ / _____ / _____ / _____

Name on Card: _____ Expiry Date: ____ / ____