

Estate Planning

Expand Your Business



CIVIC LEGAL

Estate Planning is not about lawyers making Wills. It is about the accountant and adviser providing holistic support to the client. This course enables you to expand your business and offer specialist advisory services in Estate Planning. From experience of others that have done this course, Brett guarantees an additional \$50,000 in revenue for your practice – or else the cost of the seminar is refunded.

The course is specifically designed for advisers, accountants and lawyers who want to:

- take instructions for both simple and complex tax effective Estate Planning - including 3 Generation Testamentary Trusts, Protective Trusts, Bankruptcy Trusts, Superannuation Testamentary Trusts, Mutual Powers of Attorney and Cascading Powers of Attorney to hand to a tax lawyer to complete
- have more in-depth knowledge of Estate Planning
- retain and increase client loyalty by offering a stronger and more integrated Estate Planning service
- have unlimited use of the Civic Legal internal 22 page instruction form, marketing materials and manuals
- offer extended advice on Estate Planning and generate additional fees
- better identify insurance opportunities to supplement estate assets
- retain control of the client interface and further consolidate your relationship
- have full support of Civic Legal's extensive Estate Planning system
- have 24 hours a day personal access to me for 12 months to answer all Estate Planning questions
- provide additional opportunities for your staff to up skill.

Each person attending also receives their own full Estate Planning at no cost – including 3 Generation Testamentary Trusts Wills, Protective Trusts and Cascading and Mutual

Seminar Information

Date:	Thursday 24 November 2011
Time:	8.00am – 3.00pm (morning tea and silver service lunch provided)
Venue:	The Athenaeum Club 87 Collins Street, Melbourne
Investment:	\$2,200 per person; (this includes your own Estate Planning for free for you and your spouse (valued at \$3,300)
Guarantee:	Brett will refund the cost of the seminar if you don't make \$50,000 in additional fees within the first 12 months
RSVP:	Complete the Registration Form and fax (08) 9460 5001 or email Layla.Newton@civiclegal.com.au by 18 November 2011

Presenter

Brett Davies

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

Civic Legal

(formerly Brett Davies Lawyers)



Hands on and practical, Brett is a Principal at Civic Legal. 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.

Estate Planning

Expand Your Business

Registration Form/Tax Invoice

ABN 92 126 959 206



CIVIC LEGAL

Civic Legal Pty Ltd
ACN 126 959 206
Level 2, 11 Mounts Bay Road
Perth WA 6000

Telephone (08) 9460 5000
Facsimile (08) 9460 5001
www.CivicLegal.com.au

Seminar

Date: Thursday 24 November 2011
Time: 8.00am – 3.00pm (morning tea and lunch provided)
Venue: The Athenaeum Club, 87 Collins Street, Melbourne
Investment: \$2,200 per person; plus Full Estate Planning at no cost for you and your spouse (valued at \$3,300)
RSVP: Complete the **Registration Form** and fax (08) 9460 5001 or email Layla.Newton@civiclegal.com.au by 18 November 2011
Dress: Business attire

Attendee Details

Name		Telephone	
Position		Facsimile	
Company		Email	

Additional Attendees

Name	Position	Email	Amount
Total Amount			

Payment

Direct Deposit – Civic Legal / BSB: 336-060 / Account Number: 553 312 776
Please quote our reference: "101381 (Your Name)"

Cheque attached (make payable to "Civic Legal")

Please debit my credit/debit card: Visa / MasterCard the amount of \$ _____

Card Number: ____ / ____ / ____ / ____

Name on Card: _____ Expiry Date: ____ / ____