Brett Davies
LAWYERS
Tax Lawyers Australia

Estate Planning

An untapped revenue source

Does your client checklist include a question as to whether your clients have Wills and Enduring Power of Attorneys? What do you do with this information? Correctly identifying Estate Planning issues is a valuable client service which can significantly add to your bottom line. I personally guarantee that you will get an extra $50,000 in revenue for your practice within 12 months, or I will refund the cost of the seminar.

This Estate Planning workshop is specifically designed for advisers, accountants and lawyers who want to:

- have more in-depth knowledge of Estate Planning;
- retain and increase client loyalty by offering a stronger and more integrated Estate Planning service;
- 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 unlimited use of Brett Davies Lawyers' (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 Brett Davies Lawyers extensive Estate Planning system;
- have 24 hours a day personal access to me for 12 months to answer all Estate Planning questions; and
- provide additional opportunities for your staff to up-skill.

Seminar Information

Date: Thursday, 2 December 2010

Time: 1.30 pm for 1-45 pm – 5.00 pm

Venue: Adelaide Club, 165 North Terrace, Adelaide

Investment: $395 per attendee

Registration: Return the Registration Form by fax to **(08) 9325 5999** or email Stacey@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.

The tragic catch cry of tax lawyers throughout Australia is "how much Capital Gains Tax will your family pay on your home when you die". Treasurer Paul Keating told us all in 1985 that CGT would not affect dead people or your family home. How times have changed. Last year, the government made more money via CGT on dead people than all the cumulative years of Death Duties.

Brett Davies

Brett Davies Lawyers National Roadshow

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LAWYERS
Tax Lawyers Australia Pty Ltd
ACN 126 959 206
201 Adelaide Terrace
Perth Western Australia 6000
Phone (08) 9325 7999
Facsimile (08) 9325 5999
www.TaxLawyers.com.au

Registration Form / Tax Invoice

ABN 92 126 959 206

Please complete this form and return by fax to **(08) 9325 5999** or email to stacey@taxlawyers.com.au

Seminar Information

Date: Thursday, 2 December 2010

Venue: Adelaide Club, 165 North Terrace, Adelaide

Workshops:

Session 1 – Asset Protection - 9.00 – 10.45 am (Breakfast included)

Session 2 – SMSF Limited Recourse Loans - 11.00 – 1.30 pm (Lunch included)

Session 3 – Estate Planning - 1-45 pm – 5.00 pm

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Brett Davies

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Attendee Details:

Name		**Position**	
Company		**Email**	
Telephone		**Facsimile**	

I would like to attend:
(All prices GST Inclusive)

☐ Session 1 - Asset Protection - $195
☐ Session 2 - SMSF Loans - $220
☐ Session 3 - Estate Planning - $395
☐ All Sessions - $595

Payment Details:

☐ Direct Deposit - Brett Davies Lawyers / BSB: 086-006 / Account Number: 82-646-6157
Please quote our reference: "SAsem [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: ___ ___ / ___ ___