



To The Partners & Senior Staff,  
O'Halloran Deal Lawyers invite you to a

## **Business Succession Planning & Testamentary Trusts Seminar**

**When:** Wednesday 22 April 2009

**Where:** RSL Club, Wagga Wagga

**Time:** 4.30pm - 6.30pm (followed by drinks until 8pm)

**RSVP:** Kirsty Kraynik: [kkraynik@ohalloranddeal.com](mailto:kkraynik@ohalloranddeal.com)

Tel: 02 6971 0336 **by Monday 13 April 2009**

Cost nil

For further information about O'Halloran Deal Lawyers  
visit our website at [www.ohalloranddeal.com](http://www.ohalloranddeal.com)

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## **BUSINESS SUCCESSION PLANNING:**

An important component of succession planning for a business is the agreement that governs its ownership and management. This presentation reviews the key aspects of these agreements including:

- Control provisions;
- Buy/sell provisions; and
- Deadlock resolution mechanisms;
- Default provisions.
- Restraints & confidentiality provisions;

## **TESTAMENTARY TRUSTS:**

This presentation will explore the various advantages of Testamentary Trusts. These include:

- Generous tax concessions;
- Protection against a partner's second marriage;
- Family law and bankruptcy protection for children, grandchildren etc;
- Protective trusts for vulnerable beneficiaries;
- Keeping assets away from the "in-laws";
- Capital Protected Trusts; and
- Controlling superannuation through Wills.

