



To the Partners and Senior Staff,  
O'Halloran Deal Lawyers invite you to a  
**Testamentary Trusts Part 2 & Rural  
Succession Planning Seminar**

**When:** Thursday 11 June 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 8 June 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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## ESTATE PLANNING PART 2

The Estate Planning Part 2 Seminar will:

- Provide a more detailed look at Section 102AG(2)(a) and (d)(ii) of the *Income Tax Assessment Act 1936*;
- Provide ways to retain the CGT principal home exemptions;
- Use superannuation as an estate planning tool; and
- Look at the case study of *Richstar Enterprises Pty Limited v Carey* (No.6) FCA 814 (29.06.06).

## RURAL SUCCESSION PLANNING

This seminar proposes to (through the use of case studies and examples):

- Examine in detail the intergenerational stamp duty exemption for farming businesses;
- Review some strategies for protecting the interests of the “retiring generation”; and
- Review strategies for dealing with complex trust and company structures particular those set up to deal with death duties in the 70s.

