

STEP AUSTRALIA CONFERENCE 2019

Trusts and Estates – Preparing for the Next Decade

VIBRANT SOCIAL PROGRAMME

Programme Focus:

This STEP Conference, bringing together leading minds in trusts and estates from across STEP Australia and beyond, is not to be missed.

The programme is designed to enable practitioners to update their knowledge of recent developments, and to hear about cutting edge industry trends.

The various presentations will review and comment on the challenges posed by current trends, including trustee's indemnity and obligations, settlements, family provision, modern discretionary trusts, mutual wills, valuation of family entities, forgiveness of debts by will, estate administration & tax on disclaimer, and succession laws across Australia. Included in the programme are our Canadian experts who will give insight to 'When the IRS' long-arm reaches down under'.

The programme also provides an unparalleled opportunity to network with Australian trust and estate practitioners.

	DELEGATE FEE	
	Early bird rate (Ends 31 March 2019)	Standard rate
STEP Member	AUS \$1460.00 + GST	AUS \$1735.00 + GST
Non-Member	AUS \$1760.00 + GST	AUS \$2035.00 + GST

CPD

Solicitors / Barristers / Accountants / Financial Planners who attend this conference may be able to claim 1 CPD point for each hour of the conference program itself; that is, not including time spent in social activities such as dinner. Because of the varying rules concerning CPD hours in each State and overseas, delegates should enquire of their own professional body to determine the number of CPD hours or points to which they are entitled for attendance at the Conference.

Language

This conference will be presented in English.

SPEAKERS:

- **The Hon. Chief Justice Catherine Holmes**,
Supreme Court of Queensland
- **The Hon. Dyson Heydon AC QC**,
Eight Selborne Chambers, Sydney
- **The Hon. Justice Roslyn Atkinson AO TEP**,
Supreme Court of Queensland
- **The Hon. Justice Philip Hallen TEP**,
Supreme Court of New South Wales
- **The Hon. Justice Rene Lucien Le Miere**,
Supreme Court of Western Australia
- **His Honour Judge Bernard Porter QC TEP**,
District Court of Queensland
- **Judicial Registrar Leonie Englefield TEP**,
Supreme Court of Victoria
- **Dr Bernard Walrut TEP**,
Murray Chambers, Adelaide
- **Dr Dan Morgan TEP**,
Inns of Court, Brisbane
- **Carolyn Sparke QC TEP**,
Owen Dixon Chambers West, Melbourne
- **David Marks QC TEP**,
Inns of Court, Brisbane
- **Marsha-Laine Dungog and Roy Berg**,
Moody's Gartner Tax Law, Canada
- **Professor John Glover**,
RMIT University, Melbourne
- **Richard Williams TEP**,
Brisbane Chambers, Brisbane
- **Simon Dalgarno FCA**,
Leadenhall Corporate Advisory, Adelaide
- **Laura Geitz (Dinner Speaker)**
Former Player and Captain of the Australian
National Netball Team

CONFERENCE PROGRAMME

WEDNESDAY 15 MAY, 2019

5:00 – 7:00pm Pre-Conference cocktail reception
The Stamford Plaza, Brisbane

DAY 1: THURSDAY 16 MAY, 2019

7:30am	Registration and coffee
8:45am	Chair's welcome Chair of STEP Australia
8:55am	Opening address The Hon. Chief Justice Catherine Holmes, Supreme Court of Queensland
9:15am	'I don't want It!' Estate administration & tax on disclaimer The Hon. Justice Philip Hallen TEP, Supreme Court of New South Wales
10:05am	Mutual wills – Will they still be relevant today? The Hon. Justice Rene Lucien Le Miere, Supreme Court of Western Australia
10:55am	Morning tea
11:20am	The nature of a trustee's Indemnity Dr Bernard Walrut TEP, Murray Chambers, Adelaide
12:10pm	Same same but different - Succession laws across Australia The Hon. Justice Roslyn Atkinson AO TEP, Supreme Court of Queensland
1:00pm	Lunch
2:00pm	Valuation of family entities – What could possibly go wrong? Simon Dalgarno FCA, Leadenhall Corporate Advisory, Adelaide
2:50pm	Trusts at the intersection of tax and criminal laws: "unexplained wealth" and the "effective control" of trusts Professor John Glover, RMIT University, Melbourne
3:40pm	Afternoon tea
4:05pm	STEP Worldwide Developments Simon Morgan, STEP Worldwide London
4:15pm	Settlements - The benefits of a dedicated list David Marks QC TEP, Inns of Court, Brisbane
6:30pm	Pre-dinner drinks
7:00pm	Conference dinner Laura Geitz, Former Player and Captain of the Australian National Netball Team

DAY 2: FRIDAY 17 MAY, 2019

8:00am	Registration and coffee
8:30am	An update on family provision claims in Victoria Judicial Registrar Leonie Englefield TEP, Supreme Court of Victoria
9:20am	Forgiveness of debts by will: a "bone" of contention His Honour Judge Bernard Porter QC TEP, District Court of Queensland
10:10am	Construction of wills - Extrinsic evidence and the impact of Marley v Rawlings Richard Williams TEP, Brisbane Chambers, Brisbane
11:00am	Morning tea
11:25am	When the IRS' long-arm reaches down under Marsha-Laine Dungog and Roy Berg, Moodys Gartner Tax Law, Canada
12:50pm	Lunch
1:50pm	Fraud on a power in a modern discretionary trust Carolyn Sparke QC TEP, Owen Dixon Chambers West, Melbourne
2:40pm	Trustee obligations The Hon. Dyson Heydon AC QC, Eight Selborne Chambers, Sydney
3:30pm	Afternoon tea
3:50pm	Removal applications - Executors be gone Dr Dan Morgan TEP, Inns of Court, Brisbane
4:40pm	Closing summary Chair of STEP Australia
5:00 – 7:00pm	Post-Conference cocktail reception The Stamford Plaza, Brisbane

Register now at
www.step.org/Australia2019



Networking Social Events Include:

Welcome drinks Wednesday 15 May

Stamford Plaza, Brisbane
5pm - 7pm

Delegates fee: Free [included in
conference ticket]
Guest fee: AU \$80 + GST

Delegate networking dinner Thursday 16 May

Stamford Plaza, Brisbane
7pm

Delegates fee: Free [included in
conference ticket]
Guest fee: AU \$150 + GST
[Limited tickets available]

Post-Conference event Friday 17 May

Stamford Plaza, Brisbane
5pm - 7pm

Delegates fee: Free [included in
conference ticket]
Guest fee: AU \$80 + GST

STEP Australian Branch Events

View the Events Programme for the Australian branches at <https://stepaustralia.com/events>. Each branch features their seminars, conferences and other events here.

For Web Events visit <https://webevents.stepaustralia.com>. You can view the latest STEP branch seminars and webcasts here.

Register now at www.step.org/Australia2019

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JOIN STEP AUSTRALIA

Find out more about joining STEP at

<https://stepaustralia.com/join-us/how-to-join-step/>
or contact Dior Locke, STEP Australia Regional Coordinator,
via email dior.locke@step.org

ABOUT STEP

STEP is the worldwide professional association for those advising families across generations. We promote best practice, professional integrity and education to our members. Our members help families plan for their futures: from drafting a will or advising family businesses, to helping international families and protecting vulnerable family members.

Today we have 20,000 Members across 96 countries. They include lawyers, accountants and other trust and estate specialists.

For more information about STEP, visit www.step.org or email step@step.org

For any queries please contact Dior Locke, STEP Australia Regional Coordinator, via email dior.locke@step.org

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