Legalwise

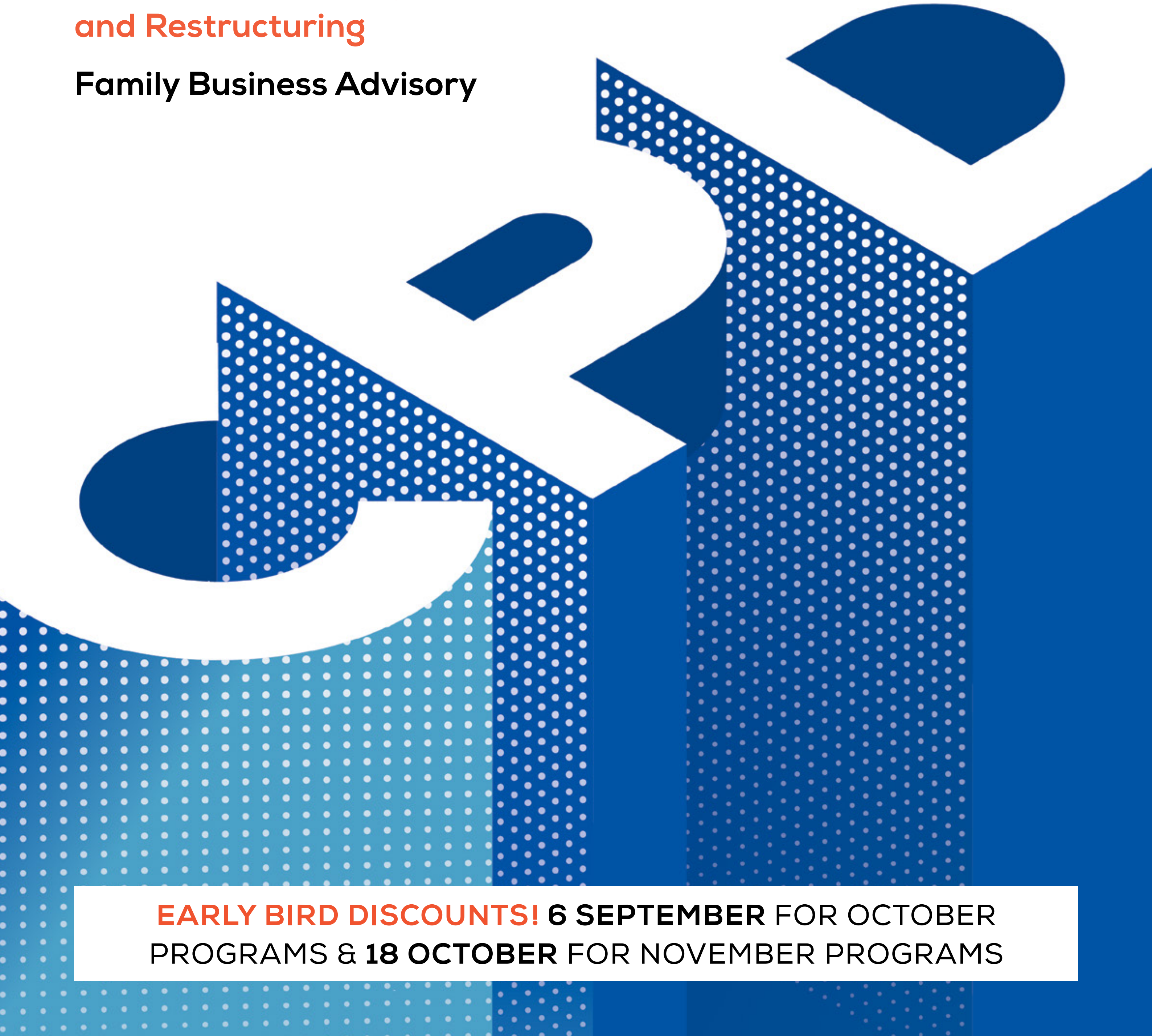
FINAL CPD PROGRAMS FOR 2019!

CPD For The Trusted Adviser

October - November 2019

Business Structuring and Restructuring

Family Business Advisory



EARLY BIRD DISCOUNTS! 6 SEPTEMBER FOR OCTOBER PROGRAMS & **18 OCTOBER** FOR NOVEMBER PROGRAMS

FAMILY BUSINESS ADVISORY CONFERENCE

2ND ANNUAL

THURSDAY, 14 NOVEMBER 2019
9.00AM TO 4.45PM

$695
1911AQ01

Find the answers to the family business dream: How to avoid family conflict but ensure business success. In one information packed day you will gain the best strategies to help your family business clients throughout the entire business lifecycle. From startup and structuring to challenges such as business succession, family or relationship breakdown, to selling, exiting and earnout arrangements, bring yourself up to speed on the key strategies from the leading tax and family law experts. At the end of the day, you will know how to effectively assist your family business clients to maximise their tax benefits but minimise the potential risks throughout the generations.

Chair: **Linda Farmer**, Principal, Private Advisory, Grant Thornton; Chartered Tax Adviser

OPENING ADDRESS

Insights from the Queensland's Largest Family Owned Motor Group

Presented by **Mark Woelders**, Managing Director and CEO, Motorama Group

PERFECTING YOUR RESTRUCTURING AND TAX EXIT STRATEGIES

From Unsuitable to Ideal: A Guide to Fixing Family Business Structures

- Family businesses often grow or change over time, but their structures do not keep pace
- Prioritising between risk protection, family desires and commercial issues
- Why tax efficiency may not meet family needs?
- Dealing with expectations and sense of entitlement

Presented by **Clifford Hughes**, Principal, Clifford Hughes & Associates; Accredited Specialist in Taxation and Business Law; Chartered Tax Adviser

Your Preparation Guide and Tax Exit Strategies for Selling a Family Business

- Business or entity sale: Which one is better?
- Issues with selling the business
  - How is the entity taxed on the gain
  - How can owners access profits
- Selling the entity:
  - Pre-sale issues with surplus assets and related party loans
  - Sale proceeds by way of dividends and/or capital gains
- Commercial issues with sale agreements
  - Transaction taxes: duty and GST
  - Warranties and indemnities

Presented by **Mark Reynolds**, Partner – Tax Advisory, Findex; Chartered Tax Adviser

Earnout Arrangements: What are They, How are they Treated and How to Make Sure the Vendor Gets Paid?

- How does an earnout arrangement differ to deferred purchase price/ vendor finance/other forms of contingent and deferred consideration?
- Understanding the earnout arrangement: How can the advisors add value?
- Commercial issues: getting paid, security and other forms of leverage
- What is the tax treatment on an earnout arrangement?
- Case studies

Presented by **Michael Hinchcliffe**, Senior Associate, McInnes Wilson Lawyers

HOW TO TURN A FAMILY BUSINESS INTO AN OVERPERFORMING JUGGERNAUT

What You Need to Advise Family Business Owners on Startup: A Behavioural and Technology Perspective

- Gain insights into family and group dynamics of a startup family business
- Understand 'intentionality' in the context of family business
- Strategic horizons of a family business: longer than you think
- Core competencies and acceptance of roles within the family, the business and the supply chain
- Family member exiting and entry expectations
- Technology, innovation and evolution as drivers and points of contention
- Role of the adviser as an individual and cohort/ team

Presented by **Lloyd Russell**, Family Business Specialist

Helping Your Client's with their Goals and Making Strategic Decisions

- Take your compliance advice one step further to create value for your clients
- Learn how to help your client's succeed in their goals and aspirations
- Enhance your skills of interpreting KPI's meaningfully
- Learn how to read financials through a different lens

Presented by **Suzy Munt**, Associate Director, Business Services and Family Business, BDO; Specialist Accredited Family Business Advisor

AVOIDING THE RISKS, DRAMAS AND PITFALLS OF RELATIONSHIP BREAKDOWNS AND BUSINESS SUCCESSION

The Strategies and Information You Need to Deal with a Family Business and a Relationship Breakdown

- What is considered property when a relationship breaks down?
- Can the family business ever be at risk when a relationship ends?
- Are there any practical ways to protect the family business from a claim from a former spouse?

Presented by **Genevieve Dee**, Partner, Cooper Grace Ward Lawyers; Accredited Specialist in Family Law; Leading Family & Divorce Lawyer, *Doyle's Guide* 2019

Modern Business Succession Planning for the Blended or Complex Family

- What issues need to be considered when planning for the succession of the family business?
- How can the family business be passed down?
- The distinction between decision making and beneficial ownership
- Putting in place a framework to succeed v 'ruling beyond the grave'
- Real life case studies for various scenarios

Presented by **Darius Hii**, Principal, Chat Legal; Chartered Tax Adviser

6.5 ATTEND THE FULL DAY AND EARN 6.5 CPD UNITS

ONLINE ONLY

SMALL BUSINESS STRUCTURING AND RESTRUCTURING CONFERENCE

2ND ANNUAL

FRIDAY, 18 OCTOBER 2019
9.00AM TO 4.45PM (LIVE WEB STREAMED FROM SYDNEY)

$695
WEB1910AN02

If you're advising a client who is structuring a business at the very initial stage, there are immediate red flags you need to raise as well as the obvious tax issues. Potential risks at the event of a relationship breakdown, estate planning issues, insurance and asset protection, just to name a few. Similarly, small business restructuring brings its own set of challenges. Obtain a practical guide to small business CGT concessions and rollovers, GST and other duties that practitioners often miss in the restructuring process. Get on top of all the cutting edge strategies you will need when your client's small business needs to be structured or restructured.

CUTTING EDGE STRUCTURING STRATEGIES TO MAXIMISE TAX BENEFITS

Chair: **Vanessa Priest**, Partner, Baskin Clarke Priest

PRACTICAL WORKSHOP

How to Avoid the Risks & Traps of Small Business Structuring

- Key issues to consider at the initial client's meeting: a step by step checklist
- Expertly tailoring a business structure to maximise asset protection
- Top level structuring strategies in key business industries including professional services and agribusinesses
- Practical tips on buy/sell agreements and insurance arrangements: dealing with unexpected death of business partner
- Case study

Presented by **Morris Maroon**, Principal and Head of Tax, Argyle Lawyers

Family Law and Business Structuring: The Details You Cannot Ignore

- Gain an understanding of how family law property settlement works and why it's important to your clients
- Learn what assets and liabilities comprise the asset pool and key factors your clients should be aware of when setting up different structures
- Practical case studies into how a loan, business or trust may be included within the pool
- Obtain insight into how your clients can protect their assets with a financial agreement

Presented by **Eleanor Lau**, Partner, Lander & Rogers; Accredited Specialist in Family Law; Recommended Family & Divorce Lawyer, *Doyle's Guide* 2019

Discretionary Trusts and Business Structures: What can and Will go Wrong

- Tips and tricks for including testamentary trusts in the estate plan
- Inter vivos trusts and their implications for the estate plan
- The danger of a single trust for multiple strands of the family
- Cloning and splitting of trusts, and CGT consequences
- Stamp duty and land tax considerations

Presented by **Stephen Lynch**, Director, Somerville Legal; Accredited Specialist in Wills & Estates; Recommended Wills, Estates & Succession Planning Lawyer, *Doyle's Guide* 2018

COMPREHENSIVE GUIDE TO RESTRUCTURING FOR SMALL BUSINESS CLIENTS

Chair: **Tony Nunes**, Senior Client Director – Tax Consulting, Kelly + Partners Chartered Accountants; Chartered Tax Adviser

Small Business CGT Concessions: Unlocking the Latest Strategies

- Overview of the small business CGT concessions
- Recent changes you need to be up to date
- Extracting the small business concessions out of a company via a members voluntary liquidation
- Practical examples: tips and traps you can't afford to miss

Presented by **Sean Urquhart**, Director – Taxation Consulting, Nexia Australia; Chartered Tax Adviser

Keep Those Rollovers Rolling: Successfully Navigating CGT and other Rollovers

- Overview of the small business restructure rollover
- What other rollovers are available when restructuring is considered?
- Tips and traps of using rollovers
- Using rollovers with tax consolidation

Presented by **Stuart Le Cornu**, Partner, Fordham Group

GST, Duty and Restructuring a Business: Understanding the Interplay and Perfecting Your Strategies

- Key GST issues
  - Intra-group supplies and going concern exemptions
  - Input taxed supplies of shares/units
- Important duty
  - Corporate reconstruction relief: Australia-wide rules and recent changes
  - Asset and share/unit transactions: Australia-wide treatment by jurisdiction

Presented by **Andrew Rider**, Barrister, Level 22 Chambers; Chartered Tax Adviser

"Very detailed and informative with great amount of advanced issues".

"Lots of intuition and insights, great presentations".

6.5 ATTEND THE FULL DAY AND EARN 6.5 CPD UNITS

ONLINE ONLY

LIVE ONLINE 1 HOUR ESSENTIAL UPDATES FOR ACCOUNTANTS AND FINANCIAL ADVISORS

NEW

Join us at lunchtime on Thursdays and hear from Australia's leading practitioners present timely and relevant content from the comfort of your office or home. These sessions are highly interactive; you can ask questions during the session, share ideas and communicate directly with the presenter and/or other delegates. All sessions are supported by comprehensive materials that are emailed to participants prior to each session

The more you learn, the more you save!

1 hour	2 – 3 hours	4 – 5 hours	6+ hours	10+ hours
$155	$140 ph	$120 ph	$99 ph	$77.50 ph

To register please visit our website **legalwiseseminars.com.au/accounting/** where the discount will apply automatically at the checkout or call us on 02 9387 8133.

ESSENTIAL SMSF & SUPERANNUATION UPDATES		
5/9/2019	TBAR, Rollovers and the Transfer Balance Cap	☐
3/10/2019	Auditing Risks: A Practical Guide	☐
7/11/2019	SMSF Trustee Death Benefit Payment Decisions	☐
5/12/2019	Tax and Superannuation: Latest Developments	☐
23/1/2020	LRBAs in SMSFs: Latest Developments	☐
6/2/2020	SMSF Pension Strategies	☐
5/3/2020	Best Interest Duty and Getting SMSF Advice Right	☐
2/4/2020	Property Development in a Fund	☐
7/5/2020	Insurance within SMSFs: A Critical Guide	☐
4/6/2020	SMSF Portfolio Review	☐

ESSENTIAL TAX UPDATES		
12/9/2019	GST Changes and Their Impact	☐
10/10/2019	Dealing with Tax Debts	☐
14/11/2019	ATO Audits on SMEs	☐
5/12/2019	Who is an Australian Tax Resident?	☐
23/1/2020	Foreign Hybrid Mismatch Rules	☐
13/2/2020	Small Business CGT Concessions	☐
12/3/2020	State Taxes Update	☐
9/4/2020	Income Tax Update	☐
14/5/2020	Division 7A in the Changing Landscape	☐
11/6/2020	ATO Objections and Appeals	☐

ESSENTIAL TRUSTS UPDATES		
19/9/2019	Trust Vesting	☐
24/10/2019	Structuring for Asset Protection	☐
21/11/2019	Testamentary Trusts and Deceased Estates	☐
12/12/2019	Family Trusts	☐
30/1/2020	Trusts: Hot Spots for 2020	☐
20/2/2020	Discretionary Trusts and the Family Court	☐
19/3/2020	Assisting Non-Residents to Set Up Trusts	☐
16/4/2020	Trusts and Wealth Management	☐
21/5/2020	Practical Trust Distribution Strategies	☐
18/6/2020	Testamentary v Super v Family v Super Pensions	☐

ESSENTIAL ESTATE PLANNING UPDATES		
26/9/2019	Conversations About Capacity: How to Start Them and why They are Important	☐
31/10/2019	Exercising Power of Attorney	☐
21/11/2019	Deceased Estates Update	☐
12/12/2019	Tax Implications for Estate Structures	☐
30/1/2020	Family Law and Estate Planning	☐
27/2/2020	Financial Agreements and Relationships	☐
26/3/2020	Child Support Issues	☐
23/4/2020	Property Settlements in the Family Court	☐
28/5/2020	Aged Care Essential Update	☐
25/6/2020	Inheritance and Estate Planning	☐

DO YOUR CPD ON THE GO

Professional development should not be hard, learn at your own pace from the comforts of your home or office. Choose from our selection of recordings and earn additional CPD points from wherever you are. All you need is an electronic device and an internet connection.

Choose from our selection of on demand recordings below and order via the website, email us on info@legalwiseseminars.com.au or call us on 02 9387 8133.

ON DEMAND RECORDINGS LIST	CODE
1 HOUR RECORDINGS	
TBAR Reporting: How it Works and the War Stories (September 2018)	OND189AN04
Exempt Current Pension Income & Segregation – Thinking Strategically (August 2018)	OND188H01
BUSINESS ADVISORY	
Business Sales Conferences (NSW, June 2019)	OND196AN02
Family Business Advisory Conference (NSW, November 2018)	OND1811AN01
Business Advisory and Client Management (NSW, September 2018)	OND189AN03
Small Business Restructuring Conference (VIC, September 2018)	OND189AV01
Gaining and Advising Business Clients: Beyond Tax (NSW September 2018)	OND189AN03A
Building a Trusted Relationship with Your Clients (NSW September 2018)	OND189AN03B
Restructuring Strategies and Rollover Issues (VIC September 2018)	OND189AV01A
The Lifeblood of Small Business: Cash Flow (VIC September 2018)	OND189AV01B
ESTATE PLANNING	
4th Annual Estate Planning Conference (NSW, February 2019)	OND192AN02
SUPERANNUATION	
SMSF Day 2019 (NSW, September 2019)	OND199AN01
SMSF Symposium: Opportunities and Threats (NSW, June 2019)	OND196AN01
SMSF Conference 2018 (NSW, November 2018)	OND1811AN02
TBAR Reporting: How it Works and the War Stories (NSW September 2018)	OND189AN04
TAX	
Small Business Tax Essentials (VIC, May 2019)	OND195AV01
Tax and Wealth Advisory: Migration, Foreign Investors & Opportunities (NSW, May 2019)	OND195AN02
Tax Strategies: Advising Individuals (VIC, May 2019)	OND195AV02
Employment Taxes and Financial Obligations Conference (NSW, February 2019)	OND192AN03
Victorian State Taxes Conference 2018 (VIC, November 2018)	OND1811AV03
TRUSTS	
4th Annual Trusts Essentials (NSW, February 2019)	OND192AN01

REGISTRATION FORM / TAX INVOICE

Legalwise

5 SIMPLE WAYS TO REGISTER	WEB	EMAIL	PHONE	FAX	POST
	legalwiseseminars.com.au	info@legalwiseseminars.com.au	02 9387 8133	02 9387 8711	PO Box 971, Bondi Junction NSW, 1355

Hurry Time is Ticking!

Early Bird for October programs ends Friday, 6 September.
Early Bird for November programs ends Friday, 18 October.

YOUR DETAILS

Salutation First name

Last name

Job Title

Company Name

Email Address

Phone

Postal address

City State Postcode

Special Dietary Requirements

GROUP AND MULTIPLE BOOKINGS: $495
Register at the same time for 2 or more conferences or register 2+ delegates from your firm and pay just $495 per delegate per conference

PAYMENT

All prices incl GST. This document will be a tax invoice for GST when fully completed and you make a payment that is under $1000. Please take a copy for your records. ALL registrations must be paid in full prior to the date of the event.

CREDIT CARD Charge $ ____________ to my

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Card Number

Expiry Date / / CVV

Security Number for AMEX is 4 digits on front of the card. All other cards last 3 digits on back of the card.

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Signature

EFT BSB: 062-124 Account Number: 1048 9181
Email your remittance to accounts@legalwiseseminars.com.au and quote your name and company name in the bank transaction reference.

CHEQUE Please find enclosed a cheque for $ __________ made payable to Legalwise Seminars Pty Ltd
ABN 40 049 329 749, ACN 102 742 843

Please register me for these programs

VENUE: MERCURE BRISBANE, LEVEL 2, NORTH QUAY BRISBANE

CONFERENCE NAME	Date	Code	Early Bird date	Early Bird fee	Std. fee	Face to Face	Live Online	On Demand Recording
2nd Annual Small Business Structuring and Restructuring Conference	18 Oct	WEB1910AN02	6 Sep	$595	$695	N/A	☐	☐
2nd Annual Family Business Advisory Conference	14 Nov	1911AQ01	18 Oct	$595	$695	☐	☐	☐

All our conferences count towards your CPD/CPE hours in accordance with the Rules of CA ANZ, CPA.

TERMS AND CONDITIONS

For Full Terms and Conditions and Privacy Policy please visit www.legalwiseseminars.com.au **Early Bird Offer:** Register and pay by 6 September for October programs and 18 October 2019 for November programs to receive the early bird offer. **Live online seminars and On Demand seminar recordings** prices are per person viewing only. They may not be distributed to another person nor may they be used for group viewings. **Variation of Program** Legalwise Seminars intends to run all programs as advertised but reserves the right to change the programs without notice and to cancel/postpone if required. If so, we will offer a transfer or a full refund/credit. **Transfer/Cancellation:** You may nominate a replacement delegate to attend in your stead at any time without charge. There is no cancellation, refund or credit available within 2 working days of the date of the program but you may nominate a replacement without charge. You may transfer from one program to another, or between face to face and online attendance within 2 working days of the date of the earlier program but then a transfer fee of $75 for a half day program and $150 for a full day program will be charged in addition to the original registration fee. No fee is charged to transfer between On-demand and Live and Online programs of exactly the same program. If you wish to cancel your registration, or transfer between face to face and electronic attendance, 3 to 5 working days prior to the date of the program then you will be charged an administration fee of $75 for a half day program or $150 for a full day program and the remainder of the original registration fee will be refunded/ credited. No fee is charged to transfer between On-demand and Live an Online programs of exactly the same program. You may cancel or transfer with no charge and receive a full refund or credit more than 5 working days prior to the date of the program. All notifications should be forwarded to info@legalwiseseminars.com.au. All credits expire 12 months from the date of the credit. **Privacy:** Legalwise Seminars Pty Ltd protects the privacy and security of information provided by you. By completing this form, you agree to the use of your personal information by Legalwise Seminars Pty Ltd. to process your registration or enquiry, to contact you about products, services and events, and for internal purposes. A list providing only the delegates' name, job title and company are provided to all presenters prior to the event.

BOOKING CODE: 1911AQ WEB