

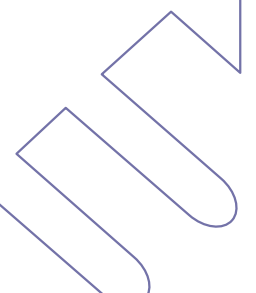


DonaldsonWalsh
Lawyers

WILLS, ESTATES &
BUSINESS SUCCESSION



STRAIGHT TALK.



Secure your future

Expert guidance to help you protect, enhance and manage your personal and business assets

You have worked hard to get what you have. It makes sense that you would want to protect your assets, use them effectively and plan for the future.

There are many ways to hold, use and protect assets, to structure and operate businesses, and to arrange for transition to following generations.

Our experienced team can provide you with up-front advice on your best options and make them happen.

For businesses, we can advise you on structuring options, financial arrangements and risk management. We can also advise you on commercial and property transactions, business succession and transition and taxation issues.

In estate and succession planning, we can help you put everything in place to ensure that the right people get what they should - regardless of what the future holds.

This requires insight into issues such as the nature of the assets and trusts or other holding entities, future care needs, family requirements and taxation implications.

It also requires appropriate and flexible documentation and arrangements such as trusts, testamentary trusts, wills, powers of attorney and other instruments that will achieve your objectives.

To assist with these documents DW now also offers EstateWise, an on-line estate planning support and advisory service which allows accountants and financial planners to provide their clients with estate planning services promptly, professionally and with clarity.

For more information visit www.estatewise.com.au

estatewise

SERVICES PROVIDED

DW's experienced team is able to assist you with:

- Asset protection
- Business succession
- Company formation
- Deceased estates
- Dispute resolution
- Estate planning
- Guardians and medical agents
- Partnerships, (family) businesses and companies
- Powers of attorney
- Superannuation funds
- Tax planning
- Trusts and testamentary trusts
- Wills
- Binding and non-binding domestic partnership agreements
- Binding and non-binding financial agreements (including pre/post nups).

STRAIGHT TALK.



MEET THE TEAM

Sandy Donaldson

direct +61 8 8229 0916
SDonaldson@dwlaw.com.au

Sandy leads our Corporate & Commercial practice and advises on issues ranging from asset acquisitions to tax and the commercialisation of intellectual property. He also has particular expertise in the wine industry.

Rod Dunne

direct +61 8 8229 0920
RDunne@dwlaw.com.au

Rod leads the firm's Wills, Estates & Business Succession team and is also a part time Senior Member of the Administrative Appeals Tribunal.

Whilst taxation law is often very complex, Rod's advice is always clear and concise. Before entering the law, Rod spent 18 years working for the Australian Taxation Office.

Kieren Moore

direct +61 8 8229 0937
KMoore@dwlaw.com.au

Kieren practises in Donaldson Walsh's Corporate and Commercial team, with a speciality in taxation law. He advises across all aspects of taxation, including income tax, capital gains tax, stamp duties and indirect taxes.

Kieren also works with private clients on matters ranging from simple wills to complex asset and wealth management and protection scenarios, including business succession arrangements.

Christopher Bruce

direct +61 8 8229 0971
CBruce@dwlaw.com.au

Chris specialises in wills and estates, franchising and intellectual property.

In the area of wills and estates, he provides advice on a range of estate planning issues, drafts wills and assists clients with the administration of deceased estates.

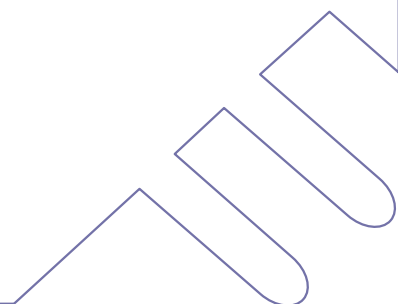
Experience in both private and government enterprises has given Chris a balanced perspective that helps him understand clients' business and personal concerns.

Madeleine Crawford

direct +61 8 8229 0917
MCrawford@dwlaw.com.au

With a strong family business background, Madeleine knows the importance of business succession arrangements and helps clients ensure that they plan and are prepared for the future. In addition, Madeleine drafts wills, prepares Probate Applications and assists generally with the administration of deceased estates.

Left to right: Kieren, Sandy, Rod, Christopher and Madeleine



OUR EXPERIENCE

The DW Wills, Estates & Business Succession team helps business owners, families and individuals to protect and manage their assets, and plan for the future.

- Administration of deceased estates, resolution of disputes in relation to wills, and grants of probate for missing or defective wills.

Some examples include advice and assistance for:

- Establishing and using self-managed superannuation funds for wealth creation and estate planning
- Business structures and transactional and other issues for business owners, including taxation, succession planning, business and property acquisitions and sales
- Property owners, including primary producers, on structuring, asset acquisitions and disposals, and taxation issues
- Individuals and business owners on estate planning issues, including drafting wills, powers of attorney, medical agent and guardian appointments, and creating protective and tax-effective structures such as testamentary trusts

KNOWLEDGE SHARING INITIATIVES

We regularly share the knowledge we have gained through our professional experience and our participation in industry groups.

To keep you up to date, we produce the DW Report. This regular report provides commentaries and updates on recent case law, legislative changes, and other analysis, reviews and news. You can download copies of this report from www.donaldsonwalsh.com.au

LIKE TO TALK?

If you would like to discuss a personal legal issue with any member of our Wills, Estates & Business Succession team, please don't hesitate to contact them directly by phone or e-mail (see "Meet the team" section on the previous page).

Or, if you have a more general legal enquiry, simply contact us through any of the channels listed here and we'll put you in contact with the most appropriate Practitioner.

Donaldson Walsh Lawyers

Kings Chambers
320 King William Street
Adelaide SA 5000

phone : +618 8410 2555
fax : +618 8410 2322
info@dwlaw.com.au

