



REGIONAL
LAW SOCIETY
— recognised by —
THE LAW SOCIETY
OF NEW SOUTH WALES

The Blue Mountains Law Society

I N A U G U R A L

SUCCESSION CONFERENCE

A two-day conference organised by the Blue Mountains Law Society

AT THE HYDRO MAJESTIC, MEDLOW BATH
SATURDAY 17 & SUNDAY 18 SEPTEMBER 2016

DAY ONE SATURDAY 17 SEPTEMBER 2016

8.45am	REGISTRATION
9.00-10.00am	Opening Remarks Justice Phillip Hallen Supreme Court Family Provision List judge
10.00-11.00am	Profession Risk with will drafting, considering the scope of the retainer as a result of <i>Badenach –v- Calvert</i> [2016] HCA 18 John Armfield John is a Barrister practising primarily in the area of estate and property litigation. John was admitted in 1983. He regularly appears and advises in respect of matters heard in the Equity Division of the Supreme Court with an emphasis on Probate, family provision applications, Will construction and review of commission to executors.
11.00-11.30am	MORNING TEA
11.30am-12.30pm	Estate planning for blended families Jenny McMillan Jenny is admitted to practice in New South Wales and Western Australia. She is an Accredited Specialist in wills and estates. She is a member of the NSW Law Society Elder Law and Succession Committee and a member of the Society of Trust and Estate Practitioners. Jenny lectures and is the Practice Leader – Wills and Estates in the College of Law's LLM (Applied Law) program. She is a part-time Senior Member (Legal) in the Guardianship Division of NCAT.
12.30-1.30pm	What is required for a competent and free testator? This session considers testamentary capacity, knowledge and approval, fraud and undue influence Michael Willmott SC Michael was called to the English Bar before being admitted to the New South Wales Bar. He was appointed Senior Counsel in 2003. His principal areas of practice are Succession and Trusts. In 2000 he was appointed to the Supreme Court Probate Committee. He is a member of the Board of Studies: Wills and Estates of the College of Law.
1.30-2.30pm	LUNCH
2.30-3.30pm	Statutory Wills: An overview with reference to the protective jurisdiction and family provision claims Craig Birtles Craig is a senior associate of the firm of Teece Hodgson & Ward, Sydney working predominantly in Estate Litigation and Protective matters. He is an Accredited Specialist in Wills & Estates Law and a member of the Society of Trust & Estate Practitioners (STEP). He is a co-author of C Birtles and R Neal, <i>Hutley's Australian Wills Precedents</i> 8th Edition (LexisNexis Butterworths) 2013. He is an adjunct lecturer for College of Law (Masters of Applied Law), Family Provision subject and a casual lecturer in the Law Extension Committee Diploma of Law, Succession Law subject.
3.30-3.50pm	AFTERNOON TEA
3.50-4.50pm	Panel discussion on topical estate litigation and estate planning issues including recent cases such as <i>Attwells</i> [2016] HCA 16 Various presenters including: Justice Geoff Lindsay, Michael Willmott SC, Jenny McMillan, Margaret Pringle, Craig Birtles and Darryl Browne
6.30 for 7pm	CONFERENCE DINNER

DAY TWO SUNDAY 18 SEPTEMBER 2016

9.20-10.20am	Operation of the Probate and Protective Lists in 2016 Justice Geoff Lindsay Supreme Court Probate and Protective Lists judge
10.20-11.20am	Intestacy: instructions to searches to distribution Margaret Pringle Margaret worked with the former Public Trustee (now NSW Trustee & Guardian) specialising in Equity litigation involving deceased estates. She is a Master of Jurisprudence (USyd). Margaret was called to the NSW Bar in May 2010 and practices primarily in the Equity jurisdiction.
11.20-11.40am	MORNING TEA
11.40am-12.40pm	Estate planning issues with superannuation including the role of wills (and appointment of executor) and preparation of death benefit nominations This session considers to whom and when a death benefit is paid, the tax consequences of the payment, types of nominations, use of nominations in blended families, the role of wills, LPRs and attorneys, and involves a case study Leah Perez Leah was admitted to practice in 2009. Leah began practising solely in Estate Planning and Deceased Estate administration in 2010. She obtained a Master of Applied Law (Wills & Estates) in 2012. In 2014 Leah was seconded to the Office of the Trustee, which has coverage of all NAB's superannuation business. Leah is member of the NSW Law Society's Elder Law Committee in 2016. Kate Gould Kate was admitted to practice in 2008. Since 2009 she has mainly practiced in estate law. She is National Manager, Estate Planning Lawyer, for National Australia Trustees Ltd.
12.40-1.40pm	Elder abuse: The profession's role Darryl Browne Darryl is an Accredited Specialist in Wills and Estates. He is the Chair of the Law Society's Ethics Committee. He has been a member (2010- 2014, 2016), Chair (2014) and Deputy Chair (2016) of the Elder Law and Succession Committee. He is a Councillor of the Law Society, a member of the Specialist Accreditation Board, the Nominations Committee and the Working Group on Future Prospects for Young Graduates. He writes bi-monthly Case Notes on wills and estates for LSJ and occasional other articles for that Journal.
1.40pm	CLOSE OF CONFERENCE

GENERAL CONFERENCE INFORMATION

Conference Registration Fee: The registration fee includes attendance at the conference, conference papers and refreshment breaks and lunch. The registration fees do not include any travel or accommodation. Delegates are advised to make their own travel arrangements.

The Conference Venue: The Hydro Majestic, Great Western Highway, Medlow Bath

Conference Accommodation: Delegates are advised to make their own accommodation arrangements directly with the Hydro Majestic.

Hotel Reservations:
Phone: (02) 4782 6885 Email: reservations@hydromajestic.com.au Website: www.hydromajestic.com.au

Travelling to the Conference Venue: Delegates are advised to make their own travel arrangements.

Conference Dress: Smart casual attire is suitable.

Registration is simple; complete the form below and fax or post your registration to us:

Blue Mountains Law Society PO Box 418, Katoomba 2780
Phone: (02) 4784 2177 Fax: (02) 4784 2145 Email: slee@browne-link.com.au Enquires: Shani Lee

Please register me for the **Inaugural Succession Conference** - a 2-day conference to be held at the Hydro Majestic, Medlow Bath on **Saturday 17 & Sunday 18 September 2016**

- Early Bird Registration** – for registrations made on or before 12 August 2016 - \$770.00 (inc. GST)
- Full Price Registration** – \$880.00 (inc. GST)
- Current Blue Mountains Law Society Members' Registration** – \$660.00 (inc. GST)
- I cannot attend the conference, but **wish to purchase the conference papers** – \$110.00 (inc. GST)
(note: the papers will not be available for dispatch until approx. 2 weeks after the conference has been held)
- Dinner** – \$150.00 (inc. GST) per person. (This includes a three course meal, drinks and entertainment)

PERSONAL DETAILS

Mr/Mrs/Miss/Ms First Name

Middle Init Last Name

Preferred Name for nametag (*if different from above*)

Position

Firm Name

Email

Postal Address

Phone Fax

PAYMENT DETAILS

Cheque

I enclose cheque for \$.....
payable to **Blue Mountains Law Society**

Direct or Internet Bank Deposit

Blue Mountains Law Society
Commonwealth Bank of Australia
BSB: 062 559 Account No: 10249336