

Seminar Invitation

Discretionary Trust Issues: Tips and Traps

With the number of family trusts in Australia presently reported to be about 928,000, an understanding of the nuances of their administration is a clear necessity. For much of the past this requirement has revolved around satisfying ATO requirements relating to the distribution of net income or its components and other tax considerations. While these remain, the interplay between these trust structures and the expectations of next generations of the controlling family are raising new challenges and different questions to be addressed by trust controllers and their advisors. The law with regard to these issues is evolving, primarily through decisions of the Courts as individual challenges are being made and determined.

During this session, our tax specialists, John and Daniel, will cover:

- Formalities for effective decision making
- Potential challenges by disgruntled beneficiaries
- Read the Deed issues
- Trust powers in the modern era
- Intergenerational planning; passing control of the family trust
- What should I do if I've lost my trust deed

We look forward to you joining us.

Date & Time

Thursday, 9 May 2024

1:00pm - 2:00pm

Venue

DW Fox Tucker Lawyers

L14, 96-100 King William Street
Adelaide SA 5000

Cost

No charge (lunch provided) -
event provided compliments of
DW Fox Tucker Lawyers

RSVP

Monday, 6 May 2024

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Our Presenters



John Tucker Director
DW Fox Tucker Lawyers

John is a recognised tax law specialist and the leader of the DW Fox Tucker tax team. With a wealth of experience in transactional matters he is alert to the potential tax traps in these and opportunities for possible benefit. He has assisted many in their business and wealth management to structure their activities, aligned with their objectives, to best advantage compliant with all relevant tax laws. Much of this activity has been around the use of trusts and in addressing issues concerning their administration, including the conduct of not infrequent disputes with Federal or State tax authorities.



Daniel Idema Director
DW Fox Tucker Lawyers

Daniel is a highly respected legal professional specialising in taxation and corporate & commercial law. His skills encompass the ability to provide precise, knowledgeable, and practical advice across a diverse range of business areas, including his proven success in helping companies navigate the complexities of state taxation.