



## Succession and estate planning

Cooper Grace Ward's succession and estate planning team provides commercial and practical advice on a broad range of matters in relation to estate planning, administration and disputes.

Our team has a strong reputation for working closely with clients and their advisers to ensure a practical estate plan is put in place; one that addresses our clients' needs and wishes and that also minimises the potential for disputes over the estate.

### Our key services

Our commercially-focused estate planning services include documentation, along with related revenue, structuring and superannuation issues, including:

- Wills and Enduring Powers of Attorney
- use of generational and direct descendant trusts to 'lock in' trust control upon death
- trust planning strategies
- strategies to transfer control of trustee and trading companies independently of clients' Wills
- gift and loan back strategies to shift value of estates to related trusts
- strategies to deal with self-managed superannuation funds, superannuation and investment assets
- protection for children with special needs
- risk management and advice strategies

- use of flexibility and superannuation to minimise disputes
- protecting assets from claims against the estate using joint tenancies
- business succession arrangements
- asset protection advice
- revenue law and superannuation matters.

Our philosophy is to work with our clients and their advisers, such as lawyers, accountants and financial planners to create an appropriate estate planning solution.

### Guardianship and administration

We can help with applications to the Queensland Civil and Administrative Tribunal for guardianship or administration of an adult with impaired capacity, including:

- preparation of applications and supporting material
- response to applications
- general advice to attorneys, guardians and administrators regarding their duties and powers.

## Estate administration

We provide expert advice with caring, personal attention in relation to all estate administration matters, including:

- applications for probate and letters of administration
- contested probate applications
- transfers of property
- collection and distribution of assets
- superannuation and tax advice
- dealing with structures such as family trusts.

### Key team contacts



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## Estate disputes

We also provide assistance with estate dispute resolution, including:

- superannuation and life insurance disputes and objections
- disputes over Wills
- defending family provision claims
- disputes involving structures outside of the estate (superannuation funds, trusts and companies).



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## About Cooper Grace Ward

With more than 200 team members, Cooper Grace Ward is a leading Australian law firm based in Brisbane, servicing clients with a local, national and international presence. As a full service firm, we are known for providing commercial and practical advice, outstanding service and excellence in all practice areas.

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