



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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