

our team



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We are all about the experience.

Our approach ensures that all engagements, once accepted, are delivered with agreed expectations in relation to timing, price and outcomes.

delivering personalised solutions that grow with your business

1800 888 966
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new south wales
sydney

queensland
brisbane

victoria
melbourne
dandenong



tax disputes

it's all about the story.

Our focus is strategic engagement with revenue authorities at the earliest opportunity. From informal pre-lodgment discussions to formal disputes and settlement negotiation, we tell a story – delivering successful outcomes by working together with our clients and their incumbent adviser.

commercial and business law

commercially motivated.

Whether it is readying a business for growth by acquisitions, facilitating an exit or changing capital structure we can advise on the legal issues and implementation of your commercial goals.

tax advisory

understand the practical consequences.

It is critical for our clients that we deliver clear solutions, giving them the confidence to keep doing what they do best. Our advisory solutions focus on minimising disruption and future proofing for growth. We keep key events and business milestones in mind, ensuring that outcomes are commercial and clients understand the consequences.

estate and succession planning

so much more than a will.

We help clients guide from the grave, preserving their wealth for future generations and protecting from claims against their estate. We have a particular focus on blended (or 'hidden') families and estates in excess of \$10 million, with multiple entities that can be separated or brought together (with relevant tax and duty consequences managed).

recent experience

Exit from family business

Advised founding family on exit from successful Queensland agricultural business. \$32 million purchase price.

Ruling from the grave

Wealthy couple (>\$30M) looking to lock-up estate for not just one or two generations, but multiple. Not only through testamentary documents, but by amending constituent documents of inter vivos companies and trusts to meet their long-term objectives.

Voluntary disclosure and settlement

Voluntary disclosure of SIS breaches by group of SMSFs involved in property JV. Currently with ATO for consideration. Potential liability of up to \$20 million including penalties and interest.

Income tax objection

\$108M in disputed assessments to HNW individual on overseas transfers from offshore family business. Working with existing accountant to assist in information gathering and draft response. Involved document disclosure and responding to statutory notices. Currently in objection phase.

Taking business to IPO

Advised client on preparing for and executing exit from current structure into pre-IPO structure – cross-border considerations and high profile transaction (>\$15M) with celebrity investor.

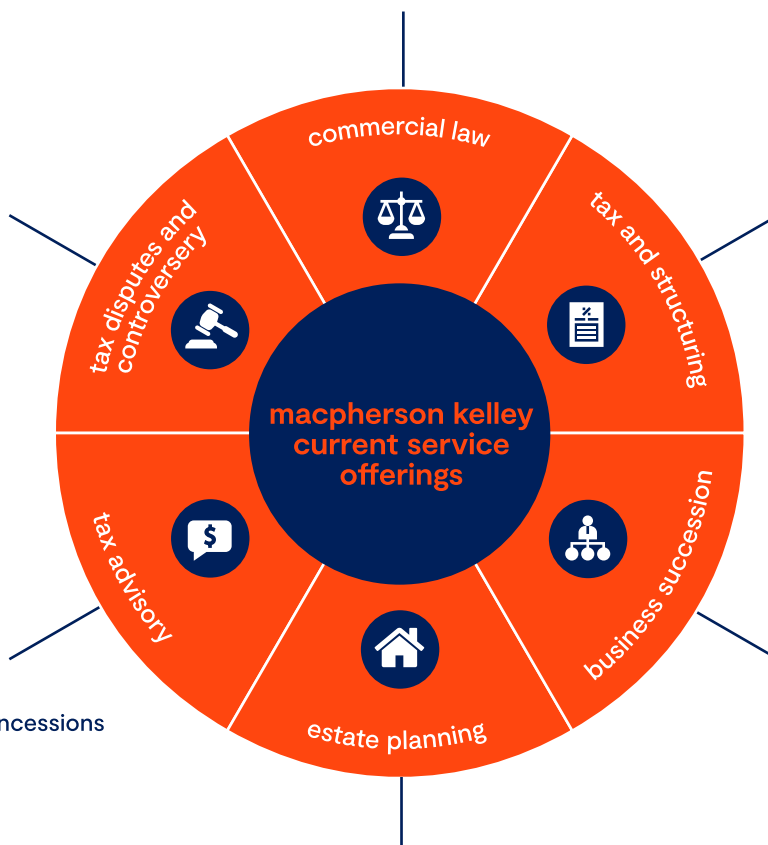
tax structuring | tax disputes | commercial

our core practice areas in more detail

- Share/unit and asset/business sale agreements (internal and third party)
- Documentation under Corporations Act i.e. financial assistance
- Joint ventures and licensing
- Analysis and interpretation of varied state and federal legislation

- Early engagement
- Private binding rulings
- Objections
- Informal and formal information requests
- Tribunal and Court disputes

- Trusts
- Superannuation
- Division 7A
- Small business CGT concessions



- Tax consolidation
- Restructures and organisations
- Duty advice
- Commercial implementation
- Tax funding/sharing agreements
- Payroll and land tax

- Shareholder/Unitholder Agreements
- Restructures
- Employee share schemes

- Simple and complex wills
- Power of attorney documents (QLD & NSW)
- Binding death benefit nominations
- Advance health care directives