

A Position of Trust – the Professional Executor/ Trustee

Location:	Boardroom of Jackson McDonald Level 25, 140 St Georges Tce, Perth
Date:	Wednesday 24 November 2010
Time:	5:30pm – 7:30pm
Cost:	\$20 (members) and \$60 (non-members)
Format:	Seminar
Topic:	This presentation outlines the responsibilities and risks involved with professionals acting as executors. The presentation will cover the period from the date of death to the date of grant.

The following matters, amongst others, will be examined:

- The appointment of executor;
- Custody of a Will;
- Responsibility for the funeral;
- Securing the assets;
- The executor's position immediately post-death;
- Inventory of the assets and liabilities; and
- The application for a Grant of Probate

About the Speaker: **Elizabeth Heenan** is a Special Counsel at Marks & Sands Lawyers. She has practised in the area of Wills and Succession Planning, Trusts, Estates, Guardianship matters and advising on Inheritance Act Applications for over 30 years. Elizabeth is the Consulting Editor to Butterworths Loose Leaf Service "Wills, Probate and Administration Service" for Western Australia. She is a member of the Attorney General's Succession Law Reform working group.

CPD: Please note, STEP Perth will apply to the Legal Practice Board to have this event recognised as a CPD event. If approved, it will attract 1 point in competency area 3 (legal knowledge). We will advise attendees of the outcome of the application in due course.

Please join us for an Educational Event of
STEP
The Society of Trust and
Estate Practitioners
Perth

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Perth

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Time: 5.30pm - 7.30pm
Venue: Jackson McDonald Boardroom,
level 25, 140 St Georges Terrace, Perth
Format: Seminar
Cost: \$20 for members and \$60 for non members
Drinks and canapes will be provided

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Yes I will attend

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Name: _____

Company: _____

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Email: _____

Please charge my Credit Card \$60.00 for Non-members \$20.00 for Members

Please find enclosed a cheque (made payable to Jackson McDonald)

Card Type:

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Upon payment this form will become a tax invoice.

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**Please post your
registration to:**

**Julie Blood, Jackson McDonald
GPO Box M971
Perth WA 6843**

or email to jblood@jacmac.com.au

For further information about STEP Perth and STEP International please contact:

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