

“Reviewing and Amending Deeds of Trust” with Grahame Young of Francis Burt Chambers

Location: Boardroom of Perpetual, Exchange Plaza
Level 29, 2 The Esplanade, Perth

Date: Thursday 14 April 2011

Time: 5:30pm – 7:30pm

Cost: \$20 (members) and \$60 (non-members)

Format: Speaker presentation

Topic: This presentation will examine what practitioners should do when reviewing and/ or amending deeds of trust and considers the potential disasters that may occur in this area.

The following matters, amongst others, will be discussed:

- The powers of a trustee
- Fiduciary duties
- Specific aspects of the trust that should be examined when asked to review a trust deed
- How to deal with beneficiary accounts and the problems with having “separate trusts”
- Amending deeds of trust
- Potential tax consequences of varying the trust deed

About the speaker:

Grahame Young was admitted to practice in 1969. He was elected to the Western Australia Bar Association in 2001. Grahame practises as a barrister in 3 main areas: trusts, equity and succession; revenue, in particular the transaction taxes of State duties, capital gains tax and GST; and general corporate, commercial and property law. As a member of the Taxation Institute of Australia for more than 25 years he held all State positions up to State Chair and was a National Councillor for 5 years. Grahame is the foundation editor of the loose-leaf service Thomson Duties Legislation Western Australia and edited and updated its forerunner from 2003. He was instrumental in forming the State Revenue Liaison Committee and advised Treasury on aspects of the Duties Act.

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 1 (Legal Skills and Practice). We will advise attendees of the outcome of the application in due course.



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STEP
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Perth

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RSVP: Tuesday 12 April 2011

Drinks and canapes will be provided

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Yes I will attend

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Please find enclosed a cheque (made payable to Jackson McDonald) \$60.00 for Non-members \$20.00 for Members

EFT Direct Payment

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Account No 01-641-5294

Please use reference STEP

**Please post your
registration to:**

Josh Maldenis, Jackson McDonald
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or email to jmaldenis@jacmac.com.au

Upon payment this form will become a tax invoice.

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