

TESTAMENTARY TRUSTS

Testamentary Trusts are trusts created by a Will.

They are an effective means of:

- Providing flexibility for trustees and beneficiaries
- Minimising tax
- Preserving income for future generations
- Protecting weak or vulnerable beneficiaries



Shaddicks

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Don Shaddick, the principal of SHADDICKS has been providing a wide range of services to the people of North Western Sydney for over thirty years.

Whilst the firm has a vibrant commercial practice, representing many substantial and successful companies we maintain a strong commitment to protecting the rights and interests of the individual.

In the latter part of the twentieth century, many people have acquired substantial assets, by acquisition, inheritance, or both. As they reach old age and eventually pass on, so it is necessary for them to responsibly and effectively pass on their assets to their loved ones.

This transfer of wealth can bring with it many and varied challenges, especially in the increasingly common "blended family" situations. Recognising this, Don Shaddick has taken a keen interest in the area of Estate Planning. He has considerable expertise and experience in this field. Working with his clients and their Accountants and Financial Advisors, he is able to tailor an Estate Plan to meet their own individual objectives. Often this involves adopting an innovative and imaginative approach.

Estate Planning involves both the client and the professional advisor in asking the question "WHAT IF?" about many possible scenarios and finding satisfactory ways to avoid or solve problems which may arise in the future, perhaps long after the client has left this world.



- ? Who will look after my affairs if I can't ...
- ? Who will authorise my medical treatment if I get dementia ...
- ? What happens if my business partner dies ...
- ? How do I prevent conflict between my spouse and my children over my estate ...
- ? Who will get my superannuation death benefits when I die ...
- ? What is a binding death benefit nomination and why would I want one ...

Ask us:



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ESTATE PLANNING IS IMPORTANT

WHY?

... TO ENSURE THAT YOUR ESTATE IS
PRESERVED DURING YOUR LIFETIME

... AND ULTIMATELY PASSES TO YOUR
BENEFICIARIES

\$ In the most tax effective manner

\$ With flexibility of management

\$ Providing protection for loved ones
who are vulnerable.

WE HAVE THE SOLUTIONS

ESTATE PLANNING TOOLS

ASK US ABOUT:

- Enduring Powers of Attorney
- Appointments of Enduring Guardian
- Wills
- Testamentary Trusts
- Superannuation

Binding Death Benefit Nominations -

(Why allow the Trustee of your Super Fund to decide
who gets your Super?)



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GET WILL POWER!

ASK US HOW YOUR WILL CAN:

- protect a child who is an addict
- protect a child who is disabled
- protect a child who is a spendthrift
- protect a child who may divorce
- protect a child who becomes bankrupt
- help your spouse qualify for a pension
- provide valuable tax minimisation for your family
- provide for future generations
- address awkward second marriage issues

WE HAVE THE ANSWERS



ACCREDITED SPECIALIST
BUSINESS LAW