



Value Added Service - Technical Expertise

TRUST SEMINAR

“Spotlight on Trusts - Still Effective in 2016?”

Trusts are a fundamental element in the planning of business, investment and financial affairs. While commonplace, they are frequently misunderstood.

Recent ATO developments have placed the use of Trusts in the spotlight, with the changes resulting in the administration of a Trust being more stringent than ever before.

This seminar will cover:

- Current ATO targets in relation to structures involving Trusts
- The effectiveness of Trusts in the current environment
- Managing distributions and Unpaid Present Entitlements
- Utilising Trusts in succession planning including passing control to the next generation
- Effectiveness of Trusts in protecting family assets when passed to the next generation, with the potential of marriage breakdown, bankruptcy, mental illness or addiction
- The need for regular review for changing circumstances

Key Note Speaker - Graeme White - Director, shall deliver this informative topic and address your queries.

In addition, Leanne Connor - Director will provide an overview of important taxation and superannuation changes that arise from the 2016 Federal Budget.

WGC Business Advisors is proud that ongoing information and support is a core service provided to Clients and to those considering becoming a Client in the future.

Date: Wednesday 11th May 2016

Time: 6:30pm to 7:30pm
Light Refreshments provided from 7:30pm

Venue: The Hotel Windsor
111 Spring Street
Melbourne VIC 3000

RSVP: By Friday 29th April 2016
Nicole Mills (03) 9654 1811
Or Email nicolem@wgcbba.com.au

A Friend or Colleague is Welcome to Attend
