Partners in business

Private Clients

Our private clients team act for individuals, family groups and business owners of all types and sizes. Our lawyers understand the unique nature of private and family businesses and offer discreet and practical advice that is attuned to the specific requirements of our clients.

Our lawyers get to know and have worked closely with our clients over many years and have become an integral part of our clients' decision making and planning processes.

We provide specialised services to our private clients in the areas of corporate structuring, asset protection, estate planning and business succession planning.

We also work closely with other professional advisors such as accountants, bankers, financial planners and investment advisors in order to ensure our clients achieve the optimal outcomes in managing and transferring their wealth.

Our expertise and experience

Our private client specialists have extensive experience in the full range of issues impacting our clients including:

- Asset protection
- Business succession planning, including sale preparation, inter-generational transition and management buy-outs
- Corporate structuring, including management and co-ownership agreements
- Estate planning and litigation, including wills and trusts
- Family and business disputes

Recent matters

- Estate planning and structuring advice and work conducted for a high net worth patriarch of a prominent commercial family operation that is conducted through a complex financial structure including a series of companies and family trusts.
- Advising and assisting the directors of a group of private companies to establish an effective succession regime for the group and its associated businesses.
- Advising a high net worth client in relation to testamentary trust and other structures in order to minimise succession and asset protection risks in the context of a vulnerable beneficiary.
- The provision of structuring advice to allow our clients to make tax effective distributions through a testamentary trust structure in respect of their specific superannuation entitlements.
- Advising a client in relation to an amendment to the vesting date of their family trust and an application under Section 81 of the Trustee Act 1925 NSW.
- Estate planning and financial structuring advice provided to the beneficiaries of a substantial lottery win. Our advice enabled our clients to better structure their affairs for tax planning, succession and asset protection purposes.

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