Grow your advisory business with the…

Topdocs Legal Estate Planning Course

specifically developed for Accountants and Financial Advisors

This is your opportunity to:

- Broaden the scope of your advisory services
- Increase advice revenue even in difficult economic times
- Increase the average value of your client base
- Attract new clients and obtain referrals from existing clients
- Increase your ability to market risk and related products

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Topdocs Legal Estate Planning Course

Incorporating Estate Planning into your practice can provide you with an opportunity to increase fee generation and further build your client base as it:

- is valued in all economic conditions
- is applicable to all clients (over time)
- can be the conduit to new clients (such as beneficiaries), and new product sales (such as insurance)

Course Outcomes

Upon completion of the course you will:

- Have the opportunity to establish or further develop Estate Planning as an integral income producing division of your practice.
- Have a more detailed understanding of the ingredients of modern Estate Planning including how Financial Planning and Accounting decisions impact the Estate Plan
- Know how to communicate to your clients their estate planning needs
- Understand how to build a fee for service model around the facilitation of estate planning services
- Confidently brief, liaise and work in conjunction with Topdocs or other legal advisors
- Have access to backup and legal support from Topdocs Legal in your ongoing delivery of this advice

CPD Points

The Topdocs Legal Estate Planning Course has received accreditation from the Financial Planning Association of Australia (FPA) for 15 hours of CPD.

Legal practitioners, accountants and other professionals will be entitled to self-assess to the extent of 15 points/hours of CPD.

About the Course

Duration:	9:00am – 5:30pm One day in person Intensive, *plus* 7 hour online training module
CPD:	15 points (FPA)
Cost:	$880 incl. GST

The Topdocs Legal Estate Planning course focuses on tax-effective asset protection and the transfer of assets after death or incapacity in ways consistent with the client's needs and goals.

You will study the legal, taxation, financial and non-financial aspects of estate planning as they relate to individuals and business enterprises.

Part of this study will include trusts, wills, probate, powers of attorney, advanced health directives, superannuation, gifts, Centrelink, asset ownership and transfers for individuals and business enterprises, including the impact of taxes such as CGT, GST, stamp duty and land tax.

You will become able to communicate your understanding of your client's estate planning needs, as well as explain and analyse estate planning techniques.

Instead of being an occasional topic of discussion with your clients, estate planning should be central to each step of your financial advice. This allows you to expand the scope of your services to your existing clients and further grown your client base.

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About Your Trainers

Lav Chhabra is a Senior Associate and the General Manager at Topdocs Legal. Lav has extensive expertise in the areas of estate and succession planning, trusts, advance care planning and commercial agreements. Lav advises clients on asset protection strategies, tax effective distribution of assets, transition of control and management of private companies and family trusts and general trust related matters.

Lav is an accomplished public speaker and trainer, who provides advice to financial advisors, accountants, lawyers and their clients. In addition, Lav has also contributed to SMSF Adviser and regularly presents webinars and master-classes on behalf of Topdocs.

Michael Roberts is a Special Counsel with Topdocs Legal. Michael specialises in the areas of complex Wills & estate planning, asset protection, succession planning for family trusts and advice on most aspects of self managed superannuation funds, advising a variety of clients from individuals and couples, business owners, farmers and professionals.

Michael has regularly presented seminars on complex estate planning, family trusts and self managed superannuation funds to accountants, financial planners and to their respective clients.

Topdocs Legal Backup and Support

Topdocs Legal also provides optional ongoing backup and legal Estate Planning support such as:

- Preparation of Wills, Deeds and other legal documents or review of current legal documentation
- Ongoing technical briefs for the adviser
- Estate Planning templates for information gathering
- Problem solving and legal technical solutions
- Joint client interviews either in person or by the use of technology such as video conferencing or web conferencing
- Provision of joint Estate Planning seminars with advisers for their clients

About Topdocs Legal

Topdocs Legal comprises a team of highly experienced lawyers specialising in providing products and services in the following areas:

- Training and seminars in the area of Estate Planning, Business Succession Planning, and Superannuation matters including SMSF Loans
- Full legal documentation and advisory services in the areas of Estate Planning, Business Services and Succession Planning, Trust, Corporate, SMSF and other Legal matters

About Topdocs

Topdocs is Australia's leading provider of quality SMSF, corporate, trust and estate planning documentation to accountants, financial planners, lawyers and other professional advisers. Our innovative online ordering solutions, specialist advice, in-house legal review and technical training enable our clients to access premium quality documents and services efficiently, at cost effective prices.

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