

Wills & Estates

Thursday 17 August 2023

Session 3 – 12.00pm – 1.00pm

Taxing times for non-resident beneficiaries in the estate plan: A thorn in the side?

We live in a globalised society where the residence of beneficiaries can change. Through the relationships of a beneficiary, an Australian family may have members who are non-Australian tax residents or foreign persons. This session will review the tax issues which arise including CGT and non-resident beneficiaries, land tax and stamp duty surcharges and trust distributions to non-resident beneficiaries.

Meet the speaker

Paul Evans, Partner, Makinson d'Apice Lawyers

Paul Evans has more than 30 years of experience in providing legal services to private clients and charities. He is an Accredited Specialist in Wills and Estates Law and a member of STEP. For the past 4 years Paul has been listed in the Doyle's Guide as one of the leading lawyers in NSW in wills, estates and succession planning. He is highly experienced in assisting a range of clients, including high net worth individuals, in transferring and protecting their wealth. Paul worked in London for 17 years and during that time he specialised in inheritance tax mitigation and the establishment and administration of both testamentary and inter vivos trusts and charities, including the King Edward's Hospital Fund for London. Paul is a regular speaker at seminars for solicitors and other professionals, on estate planning and estate administration.