

ULTIMATE

REAL ESTATE SUCCESS
COACHING PROGRAM

VIRTUAL BOOTCAMP

1. WELCOME & ASSET PROTECTION



SESSION ONE

**Welcome & How To
Protect Your Assets And
Wealth In A Changing
World Of New Risks,
Uncertainty And Threats**

SESSION ONE

WELCOME AND ASSET PROTECTION

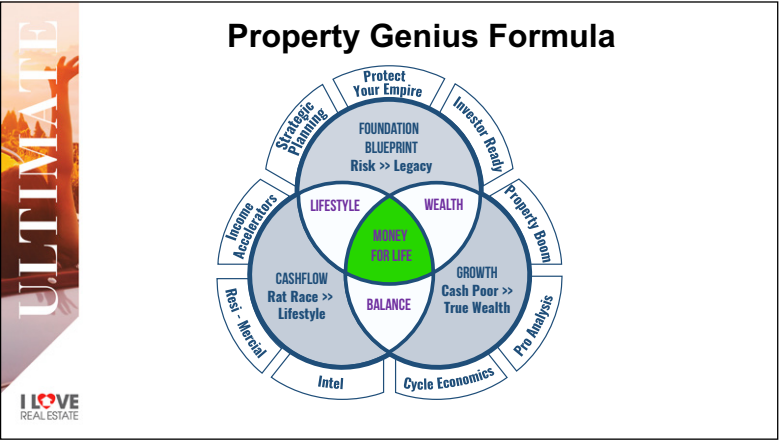


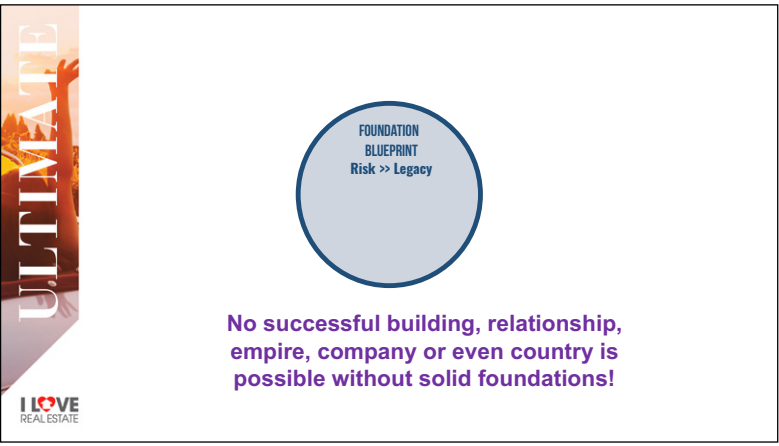
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Joint Venture Structures

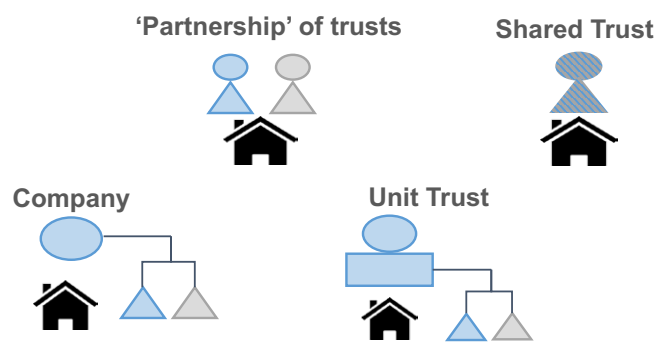
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- Structure will be driven by the deal.
- What is each party contributing?
 - Capital
 - Borrowing capacity
 - Time / Skills
 - Finding the deal
- Equal contribution or unequal?



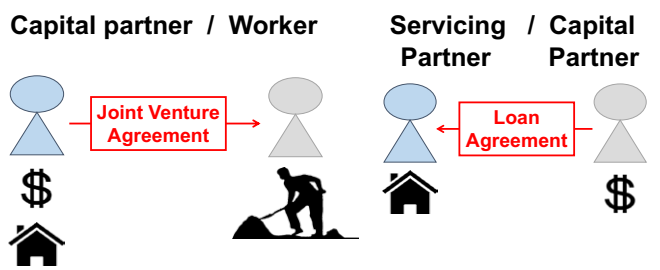
JV Shared Serviceability

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JV Difference Contributions

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Running Your Structures

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- Structures must be administered as a separate legal entity
 - Recording decisions in formal minutes
 - Separate bank account
- Documentation of transactions
 - Loan Agreements, Deeds of Gift, minutes

Structures And Divorce

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- The power of the Family Court
 - Who has the actual control?
- What can be done?
 - Third party appointors
 - Bloodline trusts
 - Binding Financial Agreements

Structures And Death

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On death or incapacity, you cease to be a director, appointor or trustee.

Who takes over?

Do you still have a role in a JV structure?



Intestacy

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- What happens if you do not have a Will ?
- What happens if you do not have an EPA ?



Death And Wills

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Wills cover personal assets, they may not cover:

- Trust assets
- Superannuation
- Joint tenanted property
- Life insurance



Testamentary Trust Wills

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- Tax advantages
- Asset protection advantages
- Bloodline restrictions



Bloodline Restricted Wills

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Your assets can continue to be governed by your Will into the future. This helps to exclude in-laws.



Preventing Claims

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- Clear communication
- Difficulty of proving the status of relationships



Incapacity

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- Enduring Powers of Attorney
 - Financial decisions
 - Healthcare decisions
- More than 420,000 Australians with dementia



Succession Planning Claims

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- Family Provision claims against Estate
- NSW – the notional estate



Establishing Companies and Trusts

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Succession Planning and Asset Protection Advice

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