

Wills and Estates

Friday 16 August 2024

Session 7 – 8:30am - 9:30am

Taxation issues for estates

Estate planning can be notoriously complicated, particularly from an Australian tax perspective. With the use of case studies, in this session we examine some of the nuances that arise when considering certain types of distributions and bequests under a will. In particular, the session will cover issues that may arise when the tax residency of the estate and the beneficiaries do not match, when a life interest in a property is granted, and when there is a dispute over the provisions of the will.

Meet the speakers

Clint Harding, Partner, Arnold Bloch Leibler Lawyers & Advisors

Clint Harding has a Bachelor of Commerce and a Bachelor of Laws from Auckland University, and a Master of Taxation from the University of Sydney. He was admitted in 1999 and became a partner at Arnold Bloch Leibler in 2012, practising in the firm's taxation department. Clint has particular expertise in corporate and international tax, the taxation of financial instruments and transactions, and the management of tax audits and disputes with the Australian Tax Office. His clients have included both public and private organisations, very high net wealth individuals, and not-for-profits. Clint received the Tax Institute's Tax Adviser of the Year Award in 2018, and the Tax Institute's 2023 Community Champion Award, for services to the tax profession. He is recognised by Best Lawyers® International, Chambers Asia Pacific and the Legal 500 Asia Pacific in the area of tax law, and has been ranked a 'Preeminent' tax practitioner in Doyle's Guide.

Danielle Ou, Solicitor, Arnold Bloch Leibler Lawyers & Advisors

Danielle Ou has Bachelor of Arts and Bachelor of Laws (Hons) degrees from the University of Auckland. She is admitted in both New Zealand and NSW and is currently a lawyer at Arnold Bloch Leibler in the Sydney taxation practice. Her experience includes corporate and international tax, transfer pricing, and representing clients in tax audits and disputes with the Australian Taxation Office. Her clients include a wide range of public and private companies, and high net wealth individuals and family groups.