BUSINESS SUCCESSION AND INTERGENERATIONAL PLANNING

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Business Succession – A Valuable Investment

- Planned Succession Type – Completely removed or partial retirement

- Timeframe – Implementation of Succession Strategy

- Successors – Family Members, Business Partner or other

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The Business Succession Profile

- Next Generation Transfers
- Inter vivos or Testamentary
- Cash and/or In Specie
- Valuations and Financing

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Business Succession – Inter vivos Transfers

- Restructuring - CGT and Income Tax and Transfer Duty considerations
- Superannuation Fund Balances
- Insurance policy matters
- Centrelink and Aged Care matters

Restructuring - Taxation, CGT and Transfer Duty

- CGT Small Business Concessions
- CGT Roll over Relief
- Trading Stock and Depreciating Assets Rollover Relief
- Access to Intergenerational Transfer Duty Relief

Superannuation – Optimal Advice

- Superannuation - Pension and Accumulation Balances
- Legally accessing your Superannuation Funds
- Taxation of your Superannuation Fund Balances
- Superannuation Strategies – A comfortable retirement

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Insurance - Tailored Solutions for Peace of Mind

- Restructures - Business Insurance
- Life Insurance
- Key man insurance and Buy/Sell agreements
- Sickness and Accident, TPD and Trauma Insurance

Centrelink Assessments

- Access to Age Pension and/or Commonwealth Seniors Card

- Centrelink - Assets and Income Tests

- Gifting Rules

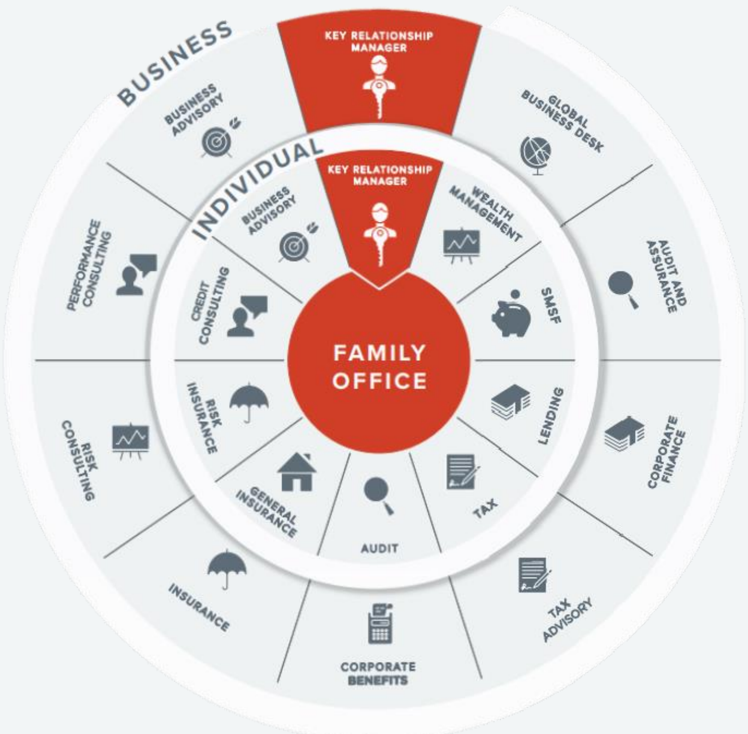
Aged Care

- Nursing Home Accommodation Bonds and In Care Costs
- Assets and Income Tested
- www.myagedcare.gov.au

Business Succession Testamentary Dispositions

- Legacy Planning - Preserving your assets for the Next Generation
- Income Tax and CGT considerations
- Superannuation and Life Insurance policy matters
- Asset Protection Strategies – Testamentary and Protective Trusts

Findex and the Family Office Model



Family Office Consultants – Placing your Interests at the Forefront of our Business.

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Questions

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