

SALLY DENNIS

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Representative transactions include:

- Formulation and implementation of comprehensive estate plans.
- Implementation of personalised strategies to minimise the tax burden of succession, including probate fees.
- Creation of trusts as asset protection and wealth management tools.
- Implementation of estate freezes and other tax-efficient corporate reorganisations.
- Wills, probate and Wills Variation Act planning.
- Implementation of philanthropic initiatives, including the creation of charitable foundations and providing advice on regulatory compliance and governance matters.
- Advising on the use and interpretation of trusts in the context of matrimonial discord.
- Implementation of post-mortem tax plans.
- Preparation of shareholders agreements, voting trusts and other mechanisms to facilitate the inter-generational transfer of family businesses.
- Purchase and sale of family businesses.