

Succession and Elder Law Festival

Recorded: 17-20 November 2020 | 8 hours 7 minutes
2020/2021 CPD year

Overview

Sunrise, sunset...

2020 saw an influx of change, uncertainty, and unprecedented disruption; and as a result, succession and elder law practitioners unwittingly became some of the key frontline workers of the legal world. So to spotlight, recognise and discuss the current and emerging trends and issues of succession and elder practise in these exceptionally challenging times, our Succession and Elder Law Conference went virtual—and we had a Festival!

Enjoy the full program of substantive sessions presented by leaders in industry and practice; and all carefully curated and designed to energise, inform, inspire and connect. All available now on demand and ready when you are.

So take the time to focus on your career, your wellbeing, and your practise. Take the time for your SELF: the 2020 Succession and Elder Law Festival.

8 CPD Points



59mins

The sunrise case update



Join us for a snapshot of the latest cases from the last 12 months, as well as the key takeaway tips on how they will impact your day-to-day, frontline practise.

Presenters:

Christine Smyth TEP, Consultant, Robbins Watson Solicitors; Former President, Queensland Law Society; Member, Queensland Law Society Succession Law Committee; Member, Queensland Law Society Specialist Accreditation Board; Member, STEP Qld and Accredited Specialist (Succession Law) – Qld

Caite Brewer, Barrister, Queensland Bar and Accredited Specialist (Succession Law) – Qld

Chair: **Ashleigh Poole**, Partner, Thynne + Macartney and Accredited Specialist (Succession Law) - Qld

1hour 3mins

Sunset Succession Express! 2-in-1

All aboard the Succession Express—for two, fast-paced, insight-packed sessions designed to bolster your practice management and business skills:

1. Tales from the field: Risk in unusual circumstances

Death Bed Wills, overbearing clients, seemingly simplistic instructions – what could possibly go wrong? And for all those times that little alarm bell goes off inside that tells you something's not quite right, how do you deal with the professional risk that arises in these suspicious situations?

Join us for a few good tales of some unusual claims triggers, as well as some practical tips and tricks for protecting yourself—and your practice—from getting caught up in the aftermath.

Presenter: **Robert Mackay**, Senior Legal Risk Solicitor, Lexon Insurance Pte Ltd

2. The psychology of cost conversations

Discussing your fees — or selling your services at a good price — is both a psychological and emotional challenge. In this session, you will explore:

- how to prepare for cost conversations and maintain a positive pricing mindset
- how a client needs to feel before accepting your fees
- how to limit fee sensitivity and respond to fee resistance
- how to sell your services at a good, assertive price.

Presenter: **Giles Watson**, Legal Practice Management Consultant

Chair: **Judy Hayward**, Special Counsel and Practice Management Consultant, Queensland Law Society, Accredited Specialist (Succession Law) – Qld

1 hour 1 min



Noontide ethics: Is the client relationship like *Alice's Adventures in Wonderland*?

This session is designed as a reminder to practitioners of the common issues that arise in frontline practice. It will consider the fundamental duties but also looks at 'competent instructions', confidentiality, management of conflicts, and the emerging US concept of 'ethical will's'.

Presenter: **Stafford Shepherd**, Principal Ethics and Practice Counsel, Queensland Law Society

1 hour 1 min



LawHack: *The sunset SELF edition*

A guided, interactive race against the clock to come up with the most creative, innovative legal and practical solutions in a non-stop, rollercoaster of a case!

This session will pit individuals and groups against each other in a fun race to come up with the most innovative solution to a series of problems—all arising from a multifaceted and intriguing legal conundrum that requires out of the box thinking to solve.

Lead by the ever-engaging Justice Daubney AM, you will incrementally receive bitesize snippets of a case study to 'solve' in real time; using whatever resources they have on hand (online legal databases, phone a friend, Google, office precedents, random brain explosions of pure genius etc) before submitting your solution/s to a panel of three learned and innovative thinkers.

The most innovative solutions, win!

Facilitator: **The Honourable Justice Martin Daubney AM**, President, Queensland Civil and Administrative Tribunal

Brains trust:

Renee Bennett, Partner, wilson/ryan/grose Lawyers and Accredited Specialist (Succession Law) – Qld

Jeneve Frizzo, Principal, The Will and All; Accredited Specialist (Succession Law) – Qld and Member, Queensland Law Society Succession Law Committee

Prue Poole, Principal, McInnes Wilson Lawyers and Accredited Specialist (Succession Law) – Qld

1 hour 1 min



The only consistency is change: 2020 legislation roundup

Receive an invaluable summary of the influx of 2020 legislative changes, as well as an overview of the various practices adopted during COVID that will continue into 2021 (and those that won't).

Presenters:

Angela Cornford-Scott TEP, Director, Cornford-Scott Lawyers; Accredited Specialist (Succession Law) – Qld; Chair, Queensland Law Society Succession Law Specialist Accreditation Advisory Committee and Chair, Queensland Law Society Succession Law Committee

Chris Herral TEP, Special Counsel, Mullins Lawyers; Deputy Chair, Queensland Law Society Succession Law Committee and Chair, STEP Qld

Chair: **Natalie Silvester**, Senior Associate, Mullins Lawyers and Accredited Specialist (Succession Law) – Qld

1hour 1min



Sunset state of mind: Overcoming frontline fatigue

At the best of times, succession and elder practise can be challenging to our resilience: after all, one of our closest co-workers is the Grim Reaper himself.

So it's no wonder that in times of global unrest, our ability to bounce back can burst quicker than a dollar-store yoga ball.

If you're feeling a little deflated after a particularly challenging year, join us for a candid, humorous and inspiring panel discussion around meeting and overcoming the unexpected side-effects of practising during a pandemic, as well as tips for fostering an effective and resilient perspective for when things go awry in life (and law).

Panellists:

Ush Dhanak, The EQ Influencer, EQ Academy

Zinta Harris, Principal, Resolve Estate Law, Accredited Specialist (Succession Law) – Qld and Accredited Specialist (Business Law) – Qld

Brian Herd, Partner, Elder Law Services, CRH Law and Member, Queensland Law Society Elder Law Committee panellist

1hour 2mins



When the daughter and son rise: Elder financial abuse

Unmasking common scenarios for the transfer of wealth before death: is it genuine, or is it financial elder abuse? This session will include practical tips and lessons from recent cases, together with a handy check list."

Presenters:

Karen Gaston, Partner and Head of Wills & Estates, Thynne + Macartney and Accredited Specialist (Succession Law) – Qld

Ann Janssen, Special Counsel, Estate First Lawyers and Accredited Specialist (Succession Law) – Qld

Bryan Mitchell, Principal, Mitchells Solicitors; Accredited Specialist (Succession Law) – Qld and Member, Queensland Law Society Succession Law Committee

Chair: **Chris Herral TEP**, Special Counsel, Mullins Lawyers; Deputy Chair, Queensland Law Society Succession Law Committee and Chair, STEP Qld

59mins



Questions on notice: The noontide smorgasbord is now open!

You'll want to bring a plate for this scrumptious selection of questions and answers (but no take-away containers, please!).

This is your chance to have all your burning succession and elder law practice questions answered. Questions may be anonymously submitted on notice, and live during the session.

Presenters:

Glenn Dickson, Barrister, Queensland Bar and Accredited Specialist (Succession Law) – Qld

Gary Lanham, Special Counsel, Minter Ellison; Past Chair, Queensland Law Society Succession Law Committee and Accredited Specialist (Succession Law) - Qld

Nathan Yii, Principal Lawyer, Nathan Yii Lawyers, Chartered Tax Advisor and SMSF Specialist Advisor