



AN AFTERNOON WITH JULIE DOLAN AND GRAEME COLLEY

Australia

"Always plan ahead. It wasn't raining when Noah built the ark" Richard Cushing.

This quote resonates so strongly when it comes to estate and incapacity planning.

The best laid tax, strategic, structuring advice and wealth accumulation can fall foul if your estate/ incapacity plans are not current and valid.

This session will cover the fundamentals of Estate/ Incapacity planning and how each part fits into the overall 'holistic' family strategy. It will also leave you with invaluable insights and tips so as to apply to your own succession plan.

Guest Presenters



GRAEME COLLEY

Executive Manager, SMSF Technical and Private Wealth at
SuperConcepts

Graeme Colley is the Executive Manager, SMSF Technical and Private Wealth at SuperConcepts. In that role his responsibilities include the provision of technical and education services to private wealth clients, maintaining the company's media and corporate profile and its advocacy with government.

Graeme has considerable taxation and superannuation experience gained from senior positions in the ATO, as an Assistant Commissioner of the Insurance and Superannuation Commission, ING as well as leading fund managers and consultants, including Macquarie Bank, Mercer and Chartered Accountants ANZ.

He is a joint author of the CCH Master Financial Planning Guide and Financial Planning in Australia. His academic experience extends to the Master of Commerce (Financial Planning) course at UWS.



JULIE DOLAN

Head of SMSF & Estate Planning for KPMG

Julie has extensive experience of over 25 years in the SMSF Industry and has been part of the SMSF journey from the start. She has deep experience in multiple facets of the accounting, wealth and SMSF sector and has been involved in many roles within these sectors.

For many years she has provided strategic / technical support, education and consulting services to hundreds of accountants, advisers and lawyers around Australia. She also regularly writes for industry publications and has also had the pleasure of educating thousands of SMSF Trustees.

Julie is currently Head of SMSF & Estate Planning for KPMG. Her role is to run the SMSF Centre of Excellence on a national basis. This includes many layers of strategy and 'thought leadership' within the industry

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