

## **PAPSON LEGAL – OVERVIEW**

Papson Legal is a progressive law firm, focussing on the areas of superannuation, estate and succession planning, taxation and general commercial (including business structuring). The firm is led by principal lawyer, Nathan Papson.

Through a mix of technical expertise, modern technology and superior client service, we aim to deliver efficient and effective legal solutions.

### **ABOUT THE FIRM – MAIN PRACTICE AREAS**

#### ***Superannuation***

Superannuation (and in particular self managed superannuation funds ('SMSFs')) is a key focus area of the practice, with the view to being a leading SMSF law firm. Our service offerings cover all SMSF legal services, including the following.

- Establishment of new SMSF trust deeds
- Upgrades to existing SMSF trust deeds
- Documentation to commence pensions
- SMSF borrowing – documentation and consulting
- Binding death benefit nominations
- Superannuation compliance advice – ensure that various transactions meet superannuation law requirements
- Excess contributions tax advice and assistance with objections
- Regular updates on the latest SMSF news and law via our newsletter

Our firm would be pleased to assist with all your SMSF enquiries. Please feel free to contact our office for assistance.

#### ***Estate and Succession Planning***

Our firm's estate and succession planning services are outlined below.

- Drafting of wills which include testamentary trusts.
- Drafting of enduring powers of attorney medical and financial and enduring powers of guardianship.
- Advice on broader succession planning issues, such as superannuation, trusts and companies and other asset structures.
- Advice and documentation to ensure continuity of a business.

We appreciate that estate planning may be difficult to consider for many people, so we have it easy to access our services in relation to wills and powers of attorney, without compromising quality. Our standard estate planning documentation package starts from \$660 including GST and includes all relevant consultation to ensure effective documentation.

## **Taxation**

Our taxation offering is primarily designed to complement the other areas of our practice (such as superannuation, trusts and estates). However, our firm has a strong tax background and can assist with a variety of taxation queries. These are as follows.

- Taxation of SMSFs, including pensions, withdrawals and death benefits
- Capital gains tax (including small business concessions)
- Income tax
- Stamp duty – including various exemptions from duty and landholder provisions
- Land tax
- GST – including going concern exemption and other relevant exemptions
- Taxation of trusts

## **Commercial (including business structuring)**

Papson Legal can assist with advising on and establishing a range of business structures. We can also assist with limited commercial law work. A list of our services is below.

- Establishment of trusts – including discretionary trusts and unit trusts
- Establishment of companies
- Deeds of variation of trusts
- Change of trustee documentation
- Deeds of confirmation and rectification
- Shareholders agreements, unitholders agreements and buy-sell agreements
- Review of various contracts, agreements and commercial documentation
- Review of bank lending documentation and solicitors certification

## **OTHER LEGAL AREAS**

Papson Legal is not a full service law firm. However, this means that we are focussed on our key areas of practice listed above.

However, Papson Legal has relationships\*\* with a number of lawyers, accountants and advisers. Depending on your requirements, we would be pleased to work in conjunction with our external network to provide you with a seamless solution. Alternatively, we can direct you to a practitioner that we are confident has expertise in the area that you require assistance with.

## **ABOUT THE PRINCIPAL – NATHAN PAPSON**

Nathan Papson is Papson Legal's principal lawyer. He has over 6 years experience in the fields of SMSF Law, taxation law, estate planning and commercial law. During Nathan's career, he has worked in the taxation division of a Big 4 accounting firm, as well as a number of prominent SMSF legal practices.

\*\* please note that Papson Legal does not have any official alliances with other professionals or their firms. Whilst we are pleased to provide referrals and work in conjunction with other professionals, as part of any engagement we encourage our clients to conduct their own research as to the suitability of other firms' services.

His qualifications include a Master of Laws from the University of Melbourne (focussed on taxation), as well as industry qualifications of Chartered Tax Adviser (by The Taxation Institute) and SMSF Specialist Adviser (by SPAA – a leading industry group on SMSFs). This combination of qualifications is among the highest attainable in the areas of SMSF and taxation law.

Nathan has given presentations on superannuation and taxation for CPA Australia, the Melbourne Business School and to various discussion groups and forums. He has also been widely published, including by The Taxation Institute's Blue Journal, Money Management Magazine, Lexis Nexis and CCH (among others).

Nathan looks forward to bringing his experience and expertise to all of Papson Legal's client assignments. He has a strong passion for SMSF law and also welcomes appropriate speaking and publishing opportunities.

Feel free to contact Nathan directly via email ([nathan@papsonlegal.com.au](mailto:nathan@papsonlegal.com.au)) or phone (Office (03) 9078 4430, Mobile 0403 290 977).

## **THE PAPSON LEGAL DIFFERENCE**

Papson Legal aims to distinguish itself as a leading SMSF firm as follows.

- Providing quality legal advice, documentation and solutions
- Setting prompt service standards for all work
- Being transparent on fees and costs (most work will be estimated as a fixed fee)
- Providing superior client service – this includes explaining complex concepts in plain English, coming to your preferred location to meet, and being available for consultation on evenings and weekends.

If you have any questions about Papson Legal's services, or if you would like to engage our services, please contact our office via the details below.

Papson Legal Pty Ltd (attention: Nathan Papson)

Mail: PO Box 1147, Armadale North, Victoria 3143

Phone: (03) 9078 4430

Mobile: 0403 290 977 (Nathan Papson)

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