



# Succession & estate planning? Our backyard.

Succession planning for a business and estate planning for an individual is critical to ensure:

- Relationships are maintained;
- Disruption to business operations on the exit of an individual is minimised and therefore profits maximised;
- Sufficient working capital is maintained in a business following the exit or death of an individual;
- Capital values are maximised by ensuring optimum structuring and minimising taxation consequences;
- The risk of litigation is minimised following an individual's exit from a business or the death of a person; and
- The overall objectives of the business' and individual's wishes are achieved.

Vincents' Succession & Estate team group provides expert taxation, structuring and litigation support to assist individuals business owners and legal professionals in the negotiation of the challenges that frequently arise in these highly specialised areas.

Vincents' Succession Planning and Estates team consists of individual specialists in accounting, taxation, superannuation, financial advisory and forensic accounting, who collectively are able to provide a comprehensive range of support services.

## Succession & estate planning

### Taxation & business solutions

- Succession planning
- 'Grooming for sale' advice
- Business / strategic plan development
- Development & documentation of business systems
- Development of 'what if' scenarios
- Feasibility assessments
- Reviews of structuring opportunities including consideration of income & capital gains tax
- Superannuation reviews, structuring & advice

### Superannuation consulting

- Superannuation structuring and advice

### Financial advisory

- Asset allocation & investment strategies advice
- Maximising financial opportunities

## Estate litigation /administration

### Estate litigation

- Estate litigation support
- Business & entity valuations
- Analysis & investigations of corporate structures
- Historical contributions analysis
- Asset tracing
- Critiquing of other accountants' reports
- Expert testimony
- Appointment as executors & administrators
- Appointment as statutory trustee for sale of assets

### Taxation & business solutions


- Estate & related individual income tax returns

### Superannuation consulting

- Superannuation structuring and advice

### Financial advisory

- Maximising financial opportunities in litigation processes

 Vincents provides expert services in the specialties of taxation & business solutions, financial advisory, corporate advisory, insolvency & reconstruction, forensic accounting, forensic technology and executive search & selection.

To find out more about our Succession & Estate specialists and our expert services, visit [www.vincents.com.au](http://www.vincents.com.au).

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