

# Wealth Management and Succession

**Kelly & Co.**  
LAWYERS



Asset and wealth protection and the future success of businesses are under constant challenge. Global conditions change, business and personal situations can alter or quite simply, the goal posts can move.

Kelly & Co.'s Wealth Management and Succession team provides solution-based strategic advice that minimises risk and opens up opportunities. Their innovative solutions ensure personal and business succession and asset protection objectives are achieved tax effectively and efficiently.

Our team will work closely with your trusted advisors including accountants, financial planners and private bankers to achieve your goals. With their extensive experience in the ownership, management, division and succession of substantial family businesses, they will ensure a smooth transition to the next generation and continued success.

The team considers a range of commercially astute business succession strategies including passing on control of the business, tax effective restructuring, insurance funding and the need for a detailed management or business succession agreement.

The Kelly & Co. Estate Planning team's deep understanding of litigation arising from estates including inheritance (family provision) claims and other beneficiary disputes enables them to provide strategically sound advice that focuses on ensuring estates are planned tax effectively with the minimum risk of dispute.

#### **Our Estate Planning Services**

- Wills, Testamentary Trusts, Letters of Wishes
- Powers of Attorney and Instruments Appointing Enduring Guardians
- Estate litigation
- Estate administration

#### **Our Asset Protection Services**

- Structuring and restructuring
- Binding financial agreements/ pre-nuptial agreements

#### **Business Succession Services**

- Devising and documenting succession strategy
- Transferring assets and control of structures
- Management buy out, initial public offering

#### **Tax Planning Services**

- Tax effective structuring and complex tax advice
- Direct and indirect taxes
- Superannuation
- Tax effective donations and prescribed private funds/private ancillary funds



## Meet the team



### Marc Romaldi

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Marc works in Kelly & Co.'s Corporate & Commercial Division and practises in the areas of taxation and stamp duty, business structuring and restructuring, general corporate, commercial, trust and partnership law and business acquisitions and sales. Marc specialises in taxation and has had experience in many areas of both domestic and international taxation, particularly capital gains tax and general income tax (including investment and divestment issues and succession/estate planning), international tax, stamp duty, GST and fringe benefits tax. These areas of specialty complement Marc's knowledge and advice regarding wealth management and succession planning issues and strategies more generally.



### Garry Winter

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Garry has extensive expertise in all aspects of taxation law including income tax, company tax, capital gains tax, stamp duties, indirect taxes, international taxes and superannuation. Garry provides advice on a comprehensive range of corporate and commercial issues to government and semi government organisations, public companies, and small to medium enterprises. He specialises in advising medium to large accounting firms, and their clients, on contracts, commercial transactions, taxation issues, superannuation, stamp duty, business structuring to achieve taxation minimisation, and asset and wealth protection.

## Kelly & Co. in South Australia

With origins dating back to 1917, Kelly & Co. is one of South Australia's leading law firms, undertaking work for some of Australia's most significant entities. Kelly & Co. has retained its independence, providing expert advice from its Adelaide base. However, its partners and practitioners excel Australia-wide and are well known across the country for their expertise and business acumen. Kelly & Co. has achieved substantial growth over the past decade, attracting an increasing number of clients from interstate and overseas.

Kelly & Co. specialises in, and is widely known for, a broad range of areas in the law including banking & finance, commercial transactions, litigation & dispute resolution, corporate advisory, employment, energy & resources, family law, insolvency & recoveries, intellectual property & IT, media & entertainment, property, infrastructure & construction, taxation & superannuation, trade practices and wealth management & succession.