

Lisa Sinclair

Consulting Principal

Bachelor of Laws
Masters in Applied Law, Wills & Estates
Diploma of Stockbroking
SAA, Accreditations (Superannuation & Margin Lending)
Financial Services RG146 certification
Diploma in Marketing
Diploma of Financial Markets



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Areas of expertise

Estate Planning & Administration
Business Succession Planning
Commercial & Corporate transactions
Conveyancing

Overview

Lisa is a highly motivated and results orientated lawyer who thrives on challenge.

Lisa has vast experience in estate planning spanning two different business sectors in financial services/markets and law. Further, she has valuable experience in the financial, investment, tax and legal aspects of advising.

Expertise

Estate Planning and Administration

Having recently completed a Masters in Wills and Estates Law, Lisa advised in relation to all aspects of Estate Planning and succession law, including:

- advising on wills, including complex testamentary trusts as well as special disability testamentary trusts and other testamentary trust structures;
- aged care and retirement village advice;
- business succession management;
- advising on and establishing trusts structures including corporate trustees;
- advising on establishing self-managed superannuation funds;
- capacity and mental health law issues;
- powers of attorney;
- enduring guardianship appointments;
- statutory will applications;
- advising on bequest clauses for individuals and unincorporated not for profit organisations;
- advising on relevant tax implications; and
- probate and administration of estates including intestate estates.

Commercial & Corporate transactions

In addition to her Estate Planning expertise, Lisa supports clients with their SME's needs such as commercial and corporate transactions, shareholder agreements, establishing trusts and self-managed superannuation funds.

Career Highlights

- Graduating in with Masters in Law, Wills and Estates;
- Advising SME providers to the aged care and retirement living sector and developing business plans to assist providers in the aged care sector;
- Drafting a not for profit's first formal Medical Research Funding Agreement to provide \$1M to a well-known national university cancer research facility;
- Running cases and representing clients in the Supreme Court of New South Wales;
- Being appointed as the Young Lawyer Representative for 2 years with the North Metro Law Society (2014-2016);
- Being appointed as Submissions Manager with the Young Lawyers (NSW) Human Rights Committee (2014 to current); and
- Being invited to present at Australia's first disabled fashion run-way event in Sydney (2015).

