

Lisa Sinclair

Group Principal



Contact Details

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Qualifications

Masters in Applied Law (Wills & Estates)

Diploma in Law

Senior Associate FINSIA

Diploma of Stockbroking

Diploma in Marketing

Diploma of Financial Services

Areas of Expertise

Intergenerational Wealth Protection

Estate Planning & Administration

Elder Law, Aged Care & Retirement

Business Succession Management

Commercial & Corporate transactions

Family Law

Conveyancing

Overview

Lisa is dedicated and driven lawyer who thrives on supporting families in all aspects of their lives encompassing client's personal and business needs.

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

Lisa has a Masters in Law, majoring in Wills and Estates Law. Lisa advises on all aspects of Estate Planning, Probate and Estate Administration, SMSF & Family Trusts, SME corporate and commercial transactions and Business Succession Management. Lisa also advises on Conveyancing including leasing as well as Family Law and litigation.

Intergenerational Wealth Protection & Family Governance

- Advising on wills, including complex testamentary trusts;
- Special disability testamentary trusts and other testamentary trust structures;
- Powers of attorney and enduring guardianship appointments;
- Statutory will applications for people without capacity;
- Litigation including Family Provision applications and estate challenges;
- Advice on assets outside of the Australian jurisdiction.
- Advising on issues relating to digital assets

Elder Law, Aged Care & Retirement Villages

- Aged care and retirement village advice and conveyancing and contract reviews;
- Capacity and mental health law issues.

SME Business Succession Management & Commercial Transactions

- Advising on and establishing trusts structures and corporate trustees;
- Advising on establishing self-managed superannuation funds;
- Buy/sell agreements;
- Shareholder agreements and partnership agreements.

Family Law

- Financial settlements and parenting agreements;
- Binding financial agreements.

Conveyancing

- Residential sales and purchases;
- Commercial leasing;
- Age care and retirement villages.

Industry Focus

Apart from advising families, Lisa's clients commonly include SME's and private and commercial wealth protection entities in the following sectors:

- Financial Services Providers and Investment Advisers;
- Self-Managed Super Funds trustees;
- Charitable trust trustee, general trustees and estate trustees;
- Small to Medium Enterprises director/shareholders;
- Digital assets start-ups including Fin-Techs;
- Aged care and retirement villages providers and associated entities.

