Michael Perkins

Head of Private Client Services

Contact Details

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Qualifications

Dip Law (SAB)
TEP Specialist qualification (Society of Trust and Estate Practitioners)

Areas of Expertise

Estate Planning
Estate Administration and Succession
Private Wealth Management
Family Business Governance and Succession
Wills, Trusts and Estates Practice
Multi Jurisdiction Estate Administration

Previous Engagement

Partner, Perkins Fahey Rosenblum, Lawyers, Sydney, Australia
Principal, Andreyev Doman, Lawyers, Sydney, Australia
Special Counsel, Diamond Conway, Lawyers, Sydney, Australia
Partner, Hooton & Perkins, Sydney Australia

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Overview

Michael is a 3rd generation practicing lawyer with over 30 years' experience in trusts, estates and private client practice. Michael has received TEP Designation from the Society of Trust and Estate Practitioners (STEP) for his expertise in these areas. His practice focusses on helping clients deal with their family, business, wealth and succession interests. He acts as mentor and general counsel to a range of closely held businesses and families.

Expertise

Estate Planning

Michael has extensive expertise in the estate planning and administration fields.

Michael and his co-author Robert Monahan originated the Estate Planning Framework that places social and community contribution as an initial policy and strategic choice for clients undertaking estate planning.

This approach has been taught at universities for over a decade and is an intrinsic model that Michael follows in his private client practice.

Estate Administration and Succession

He helps his clients meet the challenges of transitions in their lives ranging from the operation, retention or disposal of their business interests to retirement, ageing, dispute resolution and succession.

Michael acknowledges the value that strategic partnering with not for profit organisations such as the Sydney Community Foundation can give clients and their successors who want to make a social impact through their wealth administration. He advocates this model of social contribution when appropriate to the needs of his clients.

Career Highlights

A co-author of the text *Estate Planning: a practical guide for estate and financial services professionals* (LexisNexis 2005, 2008, 2011 and 2015) in addition to authoring and co-authoring many publications in the field of trust and estates law and practice and socially responsible estate planning and administration.

A contributing author with Robert Monahan to the text Financial Planning in Australia 4th, 5th and 6th editions; Sharon Taylor, Roger Juchau, Beverly Houterman & Ors (LexisNexis).

A member of the Society of Trust & Estate Practitioners (STEP) and a founder member of its Academic Community.

Current Projects

Michael is the Chairman and a founder of the business consultancy company Your Business GP Pty Limited (YBGP). Michael is working with that company to develop its role as a collaborative consultancy practice focused on delivering multi-disciplinary solutions to the operational, management and succession objectives of family and closely held businesses. YBGP works in conjunction with the Private Client Services team at Nexus Law Group to deal with the Legal Services needs of its clients and their connections.

Michael is a founding member of the Academic Community of the Society of Trust and Estate Practitioners (STEP). He is actively involved in the operations of the Community including its annual conference which in 2018 will be in Hong Kong and a symposium being held on 12th June in Sydney which is focused on giving practical guidance to businesses and private clients about dealing with their digital assets and the broader issues of dealing with the digital aspects of their lives and operations.

Michael is convening a clinical practice group of academics, estate practitioners and medical practitioners to develop and deploy interdisciplinary practices to deal with clients suffering a decline in their executive decision-making capacity. This group should deliver practical solutions to managing diminishing capacity in ageing clients and avoiding elder financial abuse.

Michael works as a member of the firm's International Wealth advisory group which helps clients manage their affairs across the multiple legal jurisdictions to which they are connected. The professional network of STEP provides this group broad capabilities to help the firm's multi jurisdiction connected clients.

STEP
ADVISING FAMILIES ACROSS GENERATIONS