

CAPABILITY STATEMENT



Although we have offices in Brisbane, Sydney and Perth, our Professional Team visit clients all around Australia. Many of our clients have been with us for more than 30 years.

This document showcases some of their amazing locations.



TABLE OF CONTENTS

01 ABOUT US	4
02 ONGOING PROTECTION	5
03 OUR EXPERTISE	6
04 BLOODLINE® TRUST	8
05 LEGAL RESOURCE CLUB®	10

ABOUT US

Our approach is to provide answers to your questions and solutions to your problems

Cleary Hoare is a boutique law firm that has been assisting Australians with tax planning, business structures, capital protection, litigation and commercial transactions for over 40 years. We have a proven history working with clients to achieve their personal and commercial goals and are known for our personalised service, innovative solutions and specialist advice.

Our professional team deliver innovative, practical and trusted solutions to clients Australia wide. We love the work we do and we approach our work with ingenuity and imagination.

Our clients are mostly private family businesses, are found all over Australia, and are both city and rural based. They are business owners and operators, contractors and professional service firms, as well as primary producers.

Our success is based on our down-to-earth approach. While traditional law firms expect their clients to come to them, we go out of our way to visit our clients and their advisers. We understand that when we meet clients in their environment we get a much better picture of their business and can therefore provide the best solutions.



ONGOING PROTECTION

Cleary Hoare's aim is to assist you and your family with the legal challenges you encounter as you move forward with your business, investment and estate planning journey.



STRUCTURE

- Company • Discretionary Trust • Unit Trust
- Hybrid Unit Trust • Absolutely Entitled Trust
- Corporate Trust • Bloodline® Trust
- Limited Partnership • Self Managed Super Funds



GROWTH

- Tax Planning • Stamp Duty Advice • Asset Protection
- Secured Debt • Corporate Participation Agreements
- Capital Investment Trusts • Corporate Trust
- Bloodline® Trust



KEY CONTRACTS

- Business Contracts • Joint Venture Agreements
- Shareholder Agreements • Leases • Supplier Contracts
- Terms of Trade • PP8R Security • Bank Finance
- Equipment Purchases



DISPUTES

- Commercial Litigation • Tax & Duties Disputes
- Business & Partnership Disputes • Debt Recovery
- Deceased Estate Challenges • Trust Disputes
- Employment Issues • Unfair Dismissal Claims



SURPLUS

- Tax Planning • Business Restructures
- CGT Restructures • Distribution Strategies
- Custom Share Structures



EXIT PLANNING

- Estate Planning & Administration • Bloodline® Wills
- Aegis® Wills • Succession Planning • SMSF Planning
- Asset/Business Sales • Pre-Sale Due Diligence
- Trade Sales

OUR EXPERTISE



TAXATION

When planning your financial affairs, it is essential that tax is taken into account, as it is a real cost to business and your family. It is imperative that tax planning be undertaken in the context of broader commercial and family objectives, and not in a vacuum.



CAPITAL PROTECTION

When planning your financial affairs, it is essential that tax is taken into account, as it is a real cost to business and your family. It is imperative that tax planning be undertaken in the context of broader commercial and family objectives, and not in a vacuum.



LITIGATION

Cleary Hoare has extensive experience in litigation and dispute resolution and advises business clients throughout Australia. Dealing with disputes is a part of business life. We can help you to choose the best avenue for dispute resolution. This may be through litigation, but often can be resolved through negotiation and compromise. Our approach is proactive and our advice is timely, practical, cost effective and commercially focused.



We enjoy chatting to people about their goals! Call any of our offices to chat to our professional staff, or make an appointment at a location thats convenient to you!

We are experts in Taxation and Captial Protection for private business

We use our market leading understanding of business structures, tax law and asset protection to help you achieve your objectives while maximising protection, tax effectiveness, and operational flexibility.



BLOODLINE[®] TRUST

The best way to ensure that your hard-earned assets are protected and preserved for the benefit of your spouse, children and grandchildren, after you have passed away, is by incorporating Bloodline[®] Trusts in your estate plan.

A Bloodline[®] Trust is a premium form of family trust where the flow of capital is restricted to your bloodline.



We have all heard stories about people forming new relationships after the death of their spouse and changing their Will to leave all of their assets to their new partner, thereby depriving their children of an inheritance. While dramatic stories of family disputes capture our interest, assets are more commonly depleted or wasted through sheer bad luck, such as the divorce or financial misadventure of your surviving spouse or children. In these cases, any assets of the individual are at risk.

The Bloodline® Trust is unique to Cleary Hoare. We invented this trust to address our clients' concerns about financial stability in the next generation. A Bloodline® Trust provides this stability, ensuring assets are protected and preserved for the benefit of your bloodline.

Under most Wills, the Will-maker leaves their estate directly to individuals, that is, their spouse (if their spouse survives them) and ultimately their children. Unfortunately, this does nothing to protect and preserve those assets in the years to come. If the individuals

to whom you have made gifts under your Will subsequently divorce, separate or suffer some financial misadventure, those assets may be severely diminished or lost entirely.

Rather than making gifts under your Will to individuals, you can make gifts to Bloodline Trusts earmarked for those individuals. After your death, the individual you have intended to benefit will control the Bloodline® Trust earmarked for them and be able to use the assets in the trust as if they owned them. However, those assets will not be at risk should the individual divorce or suffer financial misfortune.

Using a Bloodline® Trust in your estate plan, as part of your Will or as an entity in which to accumulate assets during your lifetime, provides a flexible, comprehensive and protected structure to hold assets for the benefit of your spouse, children, grandchildren, etc.

The Bloodline® Trust is unique to Cleary Hoare. We developed it, trademarked it and have proven its success time and again.

Establishing a Will utilising Bloodline® Trusts is more complex than a standard Will because of the detailed rules and conditions they contain. The cost will largely depend on the complexity of the Will-maker's estate. The potential cost savings, financial benefits, risk prevention provisions and tax advantages will far outweigh the initial cost. A fixed quote is provided before any commitment.

Under the terms of a Bloodline® Trust:

- The passing of the capital assets or proceeds is limited to the Will-maker's bloodline;
- Income may be distributed to a broader range of beneficiaries, including in-laws (at the discretion of the trustee);
- Assets are protected from attacks against beneficiaries, whether from personal creditors or the Family Court.

LegalResourceClub®

Gain exclusive access
to professional webinars
and events online

Are you an Accountant, Financial Planner or Advisor who cares about their clients and wants to add value to your business?

Would you benefit from access to complementary in-house specialist lawyers in the areas that directly affect your clients so that you could discuss client issues or problems with them?

Become a member of the Legal Resource Club®.

With more than 1,900 members throughout Australia, as an Legal Resource Club® member you will receive exclusive access to specialist professional updates to Tax, Estate, Succession Planning and Business Structure legislation as it occurs. With access to complimentary events and resources, as well as our Professional Webinar Series, The Legal Resource Club® has been providing support to Accountants and Financial Planners all around Australia for more than 25 years.

Cleary Hoare Solicitors established the Legal Resource Club in 1994, working directly with Accountants on tax planning and tax advice. Today the LRC® consists of Accountants and Financial Planners who have built their business beyond a 'compliance practice', and find the LRC® adds significant value to their business and services.

Subscribe online at clearyhoare.com.au. Membership is free to practising Accountants and Financial Planners.

QUESTIONS? GIVE US A CALL OR [CLEARYHOARE.COM.AU](https://www.clearyhoare.com.au)

We enjoy chatting to people about their goals.

Call any of our offices to chat to our professional staff, or make an appointment at a location convenient to you. Our professional team travel all around the country on a monthly basis.

CLEARYHOARE



clearyhoare.com.au
clearlaw@clearyhoare.com.au

Call any of our offices to chat to our Professional staff, or make an appointment at a location convenient to you.

Brisbane

Level 2, 1 Breakfast Creek Road,
Newstead, QLD 4006
PO Box 2684, Fortitude Valley BC, QLD 4006
T 07 3230 5222 F 07 3252 1355

Sydney

Level 9, 189 Kent Street,
Sydney, NSW 2000
GPO Box 3290, Sydney, NSW 2001
T 02 9262 5550 F 02 9299 5849

Perth

45 Ventnor Ave,
West Perth, WA 6005
T 08 9429 8883 08 9429 8800