HILLROSS

2019 Client Seminar

As a valued client, and as part of our ongoing service to you, we have the pleasure of inviting you to our annual year end seminar. This seminar aims to provide you with an informative insight into the low interest rate environment and estate planning issues.

Date: Wednesday 20th November 2019
Time: 10:30 am – 1:00pm
A light lunch will be served

Venue
Macquarie
Level 23
101 Collins Street Melbourne VIC 3000

RSVP
Please RSVP to hillross.stkildaroad@hillross.com.au or call 03 9664 9000
By Friday 15th November 2019

Family and friends are also welcome
Bookings are essential as numbers are limited


Hillross St Kilda Road
Suite 5.02
448 St Kilda Road
Melbourne VIC 3004
Ph: 9664 9000 Fax: 03 9866 9443

HILLROSS

Teiki Benveniste
Senior Investment Specialist

Teiki is a senior investment specialist within the Macquarie Investment Management Fixed Income team. He has an in-depth knowledge of global fixed income and currency markets. Teiki works closely with the investment team across all fixed income and currency investment strategies. In his previous role Teiki was part of the Investment Risk Team and was a bank loan trader for Societe Generale in London before joining Macquarie.

Teiki holds a Master in Management and a Master of Science in Finance from the EDHEC Business School in France.

Teiki will talk about the economic outlook and provide a financial market update.

Charlotta van Otterdyk
Acceditated Wills and Estate Especialist

Charlotta is an Accredited Specialist in Wills and Estates with the Law Institute of Victoria and the Principal of Jones van Otterdyk Lawyers a Boutique law firm located in Kew Victoria.

She has over 25 years' experience in legal practice, focussing over the past 10 years primarily in estate and succession planning and commercial litigation.

Charlotta has built relationships with a variety of clients and other professionals which enables her to bring a range of resources and experience to her practice. She acts for a range of clients including businesses, professionals and other individuals. Charlotta enjoys working closely with her clients to develop appropriate strategies at the earliest stage to ensure the best possible outcome.

Charlotta will be addressing

1. Nature of assets
2. While you are alive: gifts vs loans, Loan Agreements, security dealing with gifts or loans in a will
3. Passing on different types of assets
4. Protection in a will – life interests, testamentary trusts