



Bernie O'Sullivan Lawyers



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Bernie O'Sullivan

Principal

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Professional Biography

Bernie has over 35 years' experience in estate and succession planning, advising individuals, family groups and businesses on all aspects of wealth succession. Often acting as advisor to prominent families, Bernie's expertise in family and charitable trusts, superannuation funds, disputes, asset protection, international assets, charitable gifting and taxation enables him to provide clear and effective solutions for a client's complex family arrangements (such as blended families and vulnerable beneficiaries) and business structures.

One of Australia's leading estate planning lawyers, Bernie's background in trustee companies and large law firms saw him commence his own law firm in 2011. In this time he has built a strong team of senior lawyers specialising in estate planning, taxation, superannuation, dispute and commercial lawyers, all directly related to the good management of personal and business wealth. Bernie's expertise in designing strong structures for effective wealth management, succession and protection for his clients, together with his clear strategies in protecting client's interests when challenged, has led to the development of a national client base.

Working collaboratively with clients' advisers such as accountants and financial planners Bernie provides clients with practical plain-English advice. Bernie takes into account the client's family values and realities of business in achieving the best outcome for current and likely future events.

Areas of expertise

- Complex estate planning
- Family Trusts
- Wealth Succession
- Business Succession
- Superannuation funds
- Complex family and business structures
- Asset protection
- Disputes and litigation
- Taxation
- Vulnerable clients and beneficiaries
- International assets
- Charitable Trusts

Liability limited by a scheme
approved under Professional
Standards Legislation

ABN 67 117 212 547

Author

- Estate and Business Succession Planning, 7th Edition.
Published by The Tax Institute and used by several universities and other institutions
- A selection of Bernie's articles is included on the Bernie O'Sullivan Lawyers website

Qualifications

- LLB – Deakin University
- Chartered Tax Adviser

Memberships

- The Law Institute of Victoria
- The Tax Institute
- Society of Trust and Estate Professionals (STEP)

Presentations and Lecturing

Bernie regularly presents to accountants, financial planners, banking institutions, educational institutions and regulatory bodies including:

- The Tax Institute
- Deakin University – undergraduate and post graduate
- TEN Education
- CPAs
- Kaplan