



Thalia Dardamanis

Principal

e. thalia@boslawyers.com.au

Professional biography

Thalia is a highly regarded estate planning and superannuation lawyer with related comprehensive tax knowledge.

Working closely with her clients and their advisers in often complex situations, Thalia advises on the most effective structures and solutions to protect and enhance their wealth (including business succession) through important and potential life events.

Thalia's work focuses on:

- Estate planning – client and family review; tax and planning advice; preparation of testamentary trust wills, enduring powers of attorney, advance care directives, medical treatment decision makers and support persons; protecting vulnerable beneficiaries
- Business succession – complex structure review of business entities, family trusts and unit trusts; trust interpretation; planning and tax advice; preparation of business succession agreements, buy-sell agreements and bespoke company constitutions
- Superannuation – compliance, investment and tax advice; SMSF establishment and updating documents; limited recourse borrowing arrangements; complex ATO advocacy matters; family law related SMSF disputes; death benefit disputes and related insurance disputes and bespoke death benefit nominations

Areas of expertise

- Complex estate planning and business succession
- Superannuation
- Trusts
- Taxation law relating to the above

Qualifications

- Master of Laws (LLM), The University of Melbourne
- Bachelor of Laws (LLB) and Bachelor of Commerce (BCOMM) , Monash University
- Chartered Tax Advisor (CTA)
- SMSF Specialist Advisor™ (SSA)

Memberships

- The Taxation Institute of Australia - National Superannuation Technical Committee and National Superannuation Conference Organising Committee
- The Law Institute of Victoria
- SMSF Association

Presentations, lecturing and publications

Thalia's clear and practical advice style is evident in her many presentations and articles.

Thalia:

- is invited to regularly present on superannuation and succession issues at seminars and conferences
- has lectured in the foundation and advanced level of the superannuation module for The Taxation Institute of Australia's Chartered Tax Advisor program
- has written many articles and papers on estate planning and superannuation. A selection of Thalia's articles is included on the Bernie O'Sullivan Lawyers website.