

Complex Estates and Disputes

Estate administration often encompasses intricate corporate and trust structures, giving rise to complex issues and disputes. Our specialised services in this field are tailored to offer significant value, providing independent advice to assist finalising an estate or resolving disputes in a timely manner.



Issues and challenges

Deceased estates are often difficult to navigate, especially where the following matters are involved:

- Complex estates
- Complex corporate structures
- Establishment of testamentary trusts
- Will being challenged
- Feuding family members
- Operating or ongoing business undertakings
- Dealing with interests in property, assets or business
- Need for financial investigation
- Understanding of cashflow issues in separation of assets
- Dealing with outstanding taxation matters
- Understanding and planning taxation issues
- Reconstruction of financial records

Our services and expertise

Pilot can work hand-in-hand with a legal practitioner by:

- Undertaking valuations of complex corporate structures;
- Assisting with an orderly realisation of businesses and assets;
- Advising on complex taxation matters relating to the estate and its beneficiaries, including ATO private rulings, objections and tax disputes;
- Preparation of final income tax returns;
- Winding up corporate structures and trusts;
- Ensuring financial information is accurate and reconstructing incomplete data;
- Conducting investigations of historical transactions and tracing exercises;
- Attending mediation and supporting practical negotiated outcomes; and
- Providing expert evidence in Court proceedings.

Independent Administrators and Trustees

Where independence is required to safeguard and manage estates. Our services extend to:

- Acting as an independent administrator of the estate; and
- Acting as an independent trustee of testamentary trusts particularly where there are ongoing asset management or trading operations.

**Contact your Pilot
advisor on 07 3023 1300**

Complex estates and disputes can place extra pressure on already difficult situations. This is where an independent advisor could help to resolve the matters in a timely manner.

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