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advanced financial strategies · create · manage · protect

TAXATION MANAGEMENT

Family Trusts

A discretionary family trust lets you distribute income and capital gains from trust assets to other family members, and in so doing, may effectively minimise your tax.

A trust like this may help to protect assets from family claims by or against individual members in the event of a family dispute or against the misuse of assets by an irresponsible beneficiary.

A family trust also allows segmentation and management of business assets.

Certain taxation advantages can apply to such trusts where the trustee elects, under

the Income Tax Assessment Act 1936, to be classified as a family trust.

While family trusts have certain advantages, there are also disadvantages with these structures. We therefore recommend you consult legal and taxation specialists to determine how best to structure your investments for tax minimisation and preservation purposes.

If you would like to take advantage of our free consultation or would like to know more about our services please contact us on (07) 3832 6020, Email info@bridgewaterafs.com.au or visit our website on <http://www.bridgewaterafs.com.au>

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