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Wills and Probate/Family Provision/Superannuation including testamentary capacity; construction and rectification of testamentary documents; informal wills; mutual wills; claims involving estranged children, disabled claimants, blended families and charities; estates involving superannuation benefits, family companies, disability trusts and discretionary trusts.

Equity including express trusts, discretionary trusts, proprietary estoppel, “granny-flat” constructive trust and resulting trust claims; partnership disputes; unconscionability and Contracts Review Act claims.

Tax / Stamp Duty including deductions in carrying on a business; taxation of deceased estates; superannuation; construction of trust deeds and present entitlements; legal professional privilege.

Positions

Editorial Board, “Retirement and Estate Planning Bulletin”, Lexis Nexis (2014 – present)

Key Cases

Scalone v Diaconu [2021] NSWSC 1194 – family provision – adult children – estranged; limited need

Heffernan v Innes [\[2021\] NSWSC 1033](#) – informal will – effect of alcohol on capacity; lost will:

Kathryn Lee v Margaret Lee [\[2021\] NSWSC 808](#) – family provision – standard of accommodation

Estate of Huber (No.2) [\[2021\] NSWSC 187](#) – estate administration – costs – executors costs of proceedings – executors costs of appeal – executors right of indemnity

Rattigan v Hanly [\[2020\] NSWSC 1722](#) – estate administration – executor’s right to claim costs from estate

Armitage v Fraser [\[2020\] NSWSC 979](#) – family provision — applicant’s financial resources include inheritance from father with dementia who cannot change his will

Micallef v Linney – Estate of Hope Marie Linney [\[2020\] NSWSC 898](#) – probate – knowledge and approval

The Estate of Milan Zlatovski; [\[2020\] NSWSC 250](#)– probate – testamentary capacity – delusions

Barbuto v Barbuto [\[2019\] NSWSC 1023](#) – family provision – whether testamentary discretionary trust provides proper and adequate provision; lack of full and frank disclosure; gambling

Estate of Croft [2018] NSWSC 1303– probate – testamentary capacity - delusion

Estate Sackelarion [2018] NSWSC 1651 – beneficiary objection to family provision settlement

Sergeant v Glass [2017] NSWSC 1446 – administrator pendente lite – independent representative

McIntyre v O’Regan [\[2015\] NSWSC 1985](#) – family provision – adult children

Boaz v Hyde [\[2014\] NSWSC 1591](#) – restrain executor from dealing with estate property pending trial

Underwood v Gaudron [\[2014\] NSWSC 1055](#) – family provision – estranged adult child

Rappard v Williams [2013] NSWSC 1279 – legal capacity; appointment of tutors

Peipi v Peipi as Administrator of the Estate of the late Ashoor Hilaney [\[2013\] NSWSC 1520](#) – family provision – de facto; severely disabled child

Qualifications

Bachelor Economics (Accounting)/ Bachelor Laws (Hons 1)

Sydney University (1987 – 1991)

Prizes: Business Tax
Securities Market Law
Butterworths Prize - Second Combined Law Student over first three years
Frank Albert Prize – top student Faculty of Economics, Third Year
Coopers and Lybrand – top graduate over three years in Accounting

Master of Laws (Merit)

Queen Mary and Westfield College, University of London (1994 – 1995)

Chevening Scholarship

Prize – International and Comparative Copyright Law

Graduate, Company Directors Course, Australian Institute of Company Directors (2016)

Previous Employment – Australia

9/01 – 9/03 **Barrister, 12 Wentworth Selborne Chambers**

10/96 – 8/01 **Mallesons Stephen Jaques, Sydney, Australia**
1/94 -10/94 *Corporate and Commercial / Intellectual Property Senior Associate*
Advise and assist clients in identifying, capturing, financing, managing and exploiting film, television and internet content and other intellectual property assets; advise clients on brand protection and piracy litigation.

1993 **Associate to Honourable Justice Hill, Federal Court**

1990 – 1991 **Research Assistant – Tax,**
Professor Richard Vann and Lee Burns, University of Sydney

Previous Employment – Finland / Sweden

08/07 – 03/09 Global Compliance, **GE Healthcare – Life Sciences**, Uppsala, Sweden
08/06 – 08/07 Senior Legal Counsel, **GE Healthcare – Clinical Systems**, Helsinki, Finland

FCPA investigations Russia, Mexico; risk assessment Sao Paulo, Brazil site; advise on international trade controls in the Middle East including Arab embargo, humanitarian healthcare trade Syria/Sudan/Iran; open source software review; implement anti-competition/cartel/collusion risk management; implement gift policy/ethics code to comply with medical device directives and industry codes of conduct

09/05-08/06 General Counsel, **Hantro Oy, (now part of Google), Helsinki, Finland**

IT licensing, intellectual property due diligence, open source software review. intellectual property advice, implement confidentiality systems, create document database.

08/04 – 04/05 Legal Counsel, **Nokia, Helsinki**, Finland

IT licensing, patent standardisation and patent consortiums, intellectual property advice