

# CAPABILITY STATEMENT



PRIVATE ADVISORY & REVENUE

## INTRODUCTION

Our Private Advisory and Revenue team provides strategic and tailored legal solutions for private businesses, families, and their respective advisers.

With experience in mergers and acquisitions, business successions and exits, commercial transactions, structuring, estate planning and family trusts; we are not only trusted advisers for our clients but also seen as a member of the family.

The team at AJ & Co. offers an exceptional capacity to service the needs of private business owners and high net-worth individuals.

## AREAS OF EXPERTISE

### PRIVATE ADVISORY

Advisory board services	Mergers & acquisitions	Business governance	Estate Planning	Revenue & compliance
Trusts & asset protection	Family office & concierge	Structuring	Commercial transactions	Binding financial agreements
Business succession planning and family continuity	Complex estate planning	Multiple jurisdiction estate planning	Wills & powers of attorney	Testamentary trusts
Trust establishment and amendments	Business talent visa and significant investment visa	Start-up business	Scaling up of established businesses	Personal and business asset protection strategies



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## REVENUE

Tax and duty audits, objections and disputes

Payroll tax de-grouping, corporate reconstruction duty relief, private rulings

Tax advice for litigation settlements and insurance payouts

Tax advice for raising capital/debt or via hybrid instruments

Pre-transaction restructuring to optimise tax and duty outcomes

Payment arrangements, penalty and interest remissions

Tax structuring and advise on inbound investments or acquisitions by family groups

Multi-jurisdiction corporate groups, government owned corporate groups wishing to establish business in Australia

Tax structuring and advise for Australian businesses expanding overseas, joint ventures or partnering with overseas businesses

Tax residency for individuals, companies and trusts

International tax advice

Employee incentive scheme and employee share scheme

Employer obligations relating to superannuation, characterization of workers as contractor or employee, payroll tax, pay as you go withholding

Charity registration

Fundraising for not-for-profits and charities

Mergers, acquisitions and divestments of assets for not-for-profits and charities

