

# SUPERANNUATION

PROVIDING THOUGHT LEADERSHIP AND STRATEGIC, SOLUTIONS-FOCUSSED ADVICE

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With the world's population aging, superannuation and pensions are innovating and leading the investment markets.

Dedicated retirement asset pools must by necessity increase and at the same time there is an accentuated need for innovative retirement income products.

We work with our clients on the strategic management of superannuation matters and differentiate our approach by engaging in thought leadership and the law reform agenda in conjunction with industry leaders, academics and senior counsel, as well as fostering an academic focus on superannuation, trust law and regulatory issues.

We can help you with all aspects of superannuation, including:

- trust deeds, fund and trustee governance, compliance, trustee and directors' duties and documentation
- financial product rationalisation and superannuation fund mergers and associated regulatory issues
- successor fund transfers and superannuation fund acquisitions
- Superannuation Guarantee legislation, Stronger Super legislation, APRA prudential standards and ASIC regulatory guidance
- superannuation aspects of M&A transactions, including due diligence
- Australian financial services licensing and RSE licensing
- financial services disclosures including product disclosure statements, annual reports

and significant event reporting

- service provider and material outsourcing agreements with custodians and administrators
- creation and wind up of superannuation funds; and
- distribution agreements including platform services agreements.

With more than 30 years' experience in superannuation, members of our team are consistently ranked Band 1 for superannuation law in the Chambers Asia Pacific Guide, and are named leading practitioners in the area of regulation in Best Lawyers.

Drawing on our knowledge of the industry, we provide value to our clients through commercial, cost-effective solutions that recognise that in the current environment, you need support in a wide range of areas, from experts who understand the complex legal and commercial superannuation landscape.

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## RECENT EXPERIENCE

### **THE FINANCIAL SERVICES COUNCIL**

Advising on the Future of Financial Advice (FOFA) reforms including providing constitutional advice on grandfathering issues which led to grandfathering relief

### **HEALTH SUPER AND FIRST STATE**

Advising on the superannuation merger including structuring and regulatory issues

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## **A MAJOR RETAIL BANK**

Advising on misleading and deceptive conduct relating to superannuation fee disclosures, successfully avoiding an enforceable undertaking

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## **BT FINANCIAL GROUP**

Advising on all legal aspects of superannuation and investment product, entity and platforms rationalisation, resulting in significant cost savings

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## **BT FINANCIAL GROUP**

Advising on the establishment of its new superannuation product, Panorama Super, including preparation of trust deed and material outsourcing documents

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## **NATIONAL AUSTRALIA BANK**

Advising on its proposed sale of 80 percent of its wealth management business, MLC Limited. This involved advising on all aspects of this transaction, including developing innovative solutions for the restructure of the superannuation business and the separation of the risk and investment life businesses

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# OUR PEOPLE



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