



**GREGSON & ASSOCIATES**  
SUCCESSION LAWYERS

**SERVICES & CAPABILITY  
STATEMENT**





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Dear Sir/Madam,

**DECEASED ESTATE AND ESTATE PLANNING ENQUIRIES**

Our firm offers a free initial consultation in respect of Deceased estate and estate planning matters. The purpose of the meeting is to assist families to navigate the minefield of bureaucracy. If nothing more, we hope to help families understand the processes of winding up an estate from start to finish so that they are at least off on the right track. We also offer estate planning services to prevent problems in the future.

If you have any questions about estates or estate planning, please feel free to call us on:

**+61 8 6255 1010**

We are available after hours for urgent enquiries. Equally, we are happy to meet face to face to discuss your situation.

We have **enclosed** the following documents for your use should you wish to instruct us after our initial conversations:

1. Capability Statement
2. Deceased Estate Particular's Form
3. Reply Paid Envelope
4. Personal business card

We look forward to hearing from you.

Yours faithfully,

Craig Gregson LLM TEP  
Legal Practitioner Director  
[craig.gregson@gregsonandassociates.com.au](mailto:craig.gregson@gregsonandassociates.com.au)

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Liability limited by a scheme approved under Professional Standards Legislation

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## 1. Who are we?

Gregson & Associates are a specialist succession law firm conducting work in Wills and Estate Planning, Probate, Deceased Estate Administration and Estate Litigation.

The Principal of the firm is an accredited member of the Society of Trust and Estate Practitioners and the firm has been recognised by Doyle's guide as a leading Wills and Estate Litigation practice in Western Australia. The listing recognises solicitors practicing within the areas of Wills & Estates Litigation, Disputes and Contested matters in the Western Australian legal market who have been identified by their peers for their expertise and abilities in these areas.

## 2. What we stand for?

We have developed a reputation for having the highest of professional standards. The firm is invested in constantly improving on best practice. The motto of the firm's Principal is that law is a profession first and a business second. To read a copy of the STEP Code of Professional Conduct visit <https://www.step.org/code-conduct>.

## 3. What do we do? (our service offerings)

We specialise in succession law. The most common service provided to our clients is an all-inclusive estate administration service. That is to say, you hand us the file and we deal with the legalities, the bureaucracy and the headaches. Some clients ask for specific items of work to be performed. Below is a list of the kinds of work that we carry out.

### **Probate and Estate Administration:**

- Estate Administration
- Basic Applications for Probate or Letters of Administration
- Complex Applications for Probate and Letters of Administration
- Applications for Probate of Informal Wills/Codicils
- Applications to Probate Lost Wills
- Special and Limited Grants
- Applications to Re-Seal Foreign Grants
- Preparing Deeds Under s17a of the *Administration Act 1903* (WA)
- Preparing Various Estate Related Deeds, Guarantees, Releases and Indemnities
- Conveyancing

- The Resolution of Requisitions
- Preparing Distribution Plans and Partitions
- Advice on Insolvent Estates and Administration Issues

#### **Estate and Trust Litigation:**

- Challenges to Wills / disputes under the *Family Provision Act 1972* (WA)
- Executor and Trustee Disputes and Removal
- Administration Actions
- Devastavit Actions
- Caveat Actions
- Citation Actions
- Construction Actions (interpretation of Wills)
- Applications for Judicial Advice
- Breach of Trust
- Accounts
- Superannuation Complaints Tribunal disputes
- Applications under the *Guardianship and Administration Act 1990* (WA)(contested and uncontested)

#### **Non-Contentious Estate Planning:**

- Drafting Simple Wills
- Drafting Complex Estate Plans
- Testamentary Discretionary Trusts
- Special Purpose Disability Trusts
- Superannuation Proceeds Trusts
- Review of Trust Deeds and Variations to Trust Deeds to compliment Estate Plan
- Binding Death Benefit Nominations for Self-Managed Superannuation Funds
- Contentious/Defensive Estate Planning
- Enduring Powers of Attorney
- Enduring Powers of Guardianship
- Advanced Health Directives

#### **4. How we do it?**

The firm uses a combination of technology, established precedents, and task mapping to ensure that matters are handled effectively and efficiently. This allows our services to be more cost effective when compared to our competitors. It ensures that no stone is left unturned.

#### **5. What are the benefits of using our firm?**

Firstly, we take pride in how easily our client intake can be completed. We can assist our clients to send identification, approve quotes and cost agreements all at the press of a button. Secondly, our firm has developed long standing relationships with other professionals including but not limited to accountants, realtors, valuers, auctioneers and conveyancers. These businesses are experienced in estate administration and are available on speed dial.

#### **6. Our fee structures and deferred fee arrangements.**

Most people cannot afford big legal bills. You should not be worried about money when a loved one dies. In most estates we manage, fees are taken entirely from the estate once the assets become available.

The other unique approach our firm takes towards billing is that it does not provide time charged services. We only provide fixed fee quotes which never change. This avoids cost blow outs and over servicing which regrettably does occur within the legal profession.

#### **7. Contact information and next steps**

If you have any questions, please feel free to call us on **+61 8 6255 1010** for a no obligation free general advice. We can also arrange for you to have a face to face appointment or a video conference. Alternatively, our other contact details are set out below:

**t** +61 8 6255 1010

**f** +61 8 62551011

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## 8. Testimonials

### **Kerstin Stringer – Legal Practice Director at Mandurah Legal**

*“I have briefed Craig on various occasions as well as referred work directly to him. He is competent, knowledgeable, friendly and always produces work in a timely manner. Craig is passionate about all things deceased estates and goes above and beyond for clients. He is always in the forefront of mind when I need a hand with complex estate matters and I happily recommend him to my colleagues.”*

### **Marie-Louise Macdonald - CEO Masonic Care**

*“Craig is a diligent and highly professional lawyer that you want on your side if you are in the right. I am very happy to recommend him.”*

### **Henry Neil Graham – Former Client**

*“Would recommend anyone in Western Australia to use Gregson & Associates! I was amazed how quickly they got the job done without a headache. Reasonably good price and friendly service! If you have any family trust questions that need answering give these guys a call. Henry.”*

### **Mario Cheldi – Former Client**

*“Craig was hired to resolve a dispute involving a deceased estate on my wife’s family side. Craig demonstrated to me that he is a very knowledgeable and experienced lawyer with an ability to adequately explain complex legal scenarios and help navigate the legal process for our case. I must also say that Craig was very easy to deal with. It was through Craig’s determination and persistence that our case was resolved with a very good outcome for my wife’s family.”*

### **Marina Kuneman - Former client**

*“Craig was recommended to me to assist with a Supreme Court matter. As an individual caught up in this system, the case was overwhelming for me. Most important for me was to feel confident in the lawyer and that the case was in control, and this was so with Craig. Throughout the process, I always felt reassured by Craig’s legal knowledge and experience. Furthermore, Craig is very communicative. He explained clearly the process and the steps. Craig was always accessible, and he kept me updated and replied quickly to my queries and concerns. Craig achieved the best outcome for me: the case was completed on-time and without complications.”*

### **Nicole Dunwoodie - Former Client**

*When my life fell apart in 2016, he made picking up the pieces as relatively simple as he could. He handled everything for me from start to finish, he acted as my lawyer, real estate agent, settlement agent and friend and had it sorted in half the time frame I was given. I honestly can't rate him enough! This guy is a gun at his job and gets things done fast and efficiently. Thank you for everything Craig. Your attention to detail and friendly, considerate and compassionate demeanour made you an absolute pleasure to deal with.*

### **Michele Davis – Head of Succession and Elder Law Wilson Lawyers**

*Craig is a very knowledgeable and skilled succession lawyer. Craig demonstrates professionalism and drive in all that he does and thrives in dealing with complex matters which is a testament to his technical skill and passion in this area of law. I have no hesitation in recommending Craig.*

### **Sheryle Taylor - Former Client**

*I was referred to Craig by Mandurah Legal to help resolve my Brothers estate. I cannot thank Craig enough for his diligent approach during this extremely difficult and frustrating time. His knowledge on deceased estates and his ability to think outside the square helped navigate an extremely complex journey to a positive outcome.*

### **Jan Goldstone – Former Client**

*I've known Craig Gregson for about 3 years now, having worked with him on a long and difficult case. I have found him to be friendly, dedicated, knowledgeable and very professional. I'm happy to stay in touch with Craig for any future needs and certainly recommend his services.*

