

JOANNE CARUSI

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Special Counsel | Wills and Estates

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Joanne is a Special Counsel and heads up the Wills & Estate team at Barry.Nilsson.

With more than 25 years' experience in law, Joanne has spent the last 13 years practising exclusively in:

- Estate planning
- Succession law
- Wills
- Powers of attorney
- Business structuring and asset protection
- Estate administration and estate disputes
- Elder law

She has a particular passion for protection of vulnerable beneficiaries by inclusion of Protective Trusts and Special Disability Trusts in Wills and has extensive experience in elder law abuse.

“You spend a lifetime building your wealth, but what happens to it after you're gone? It's my job to make sure it's distributed in accordance with the clients wishes, but also to obtain maximum benefit for their loved ones. Estate planning is an essential part of life to ensure that your business, family and potential beneficiaries are adequately protected. I enjoy helping clients protect their wealth for future generations.”

Prior to joining BN, Joanne worked in a number of senior legal roles, including running her own practice.

Her experience in estate planning and structuring includes the preparation of documentation including:

- Testamentary Trusts
- Speciality trusts including Special Disability Trusts
- Child Support Trusts and Protective Trusts for clients with vulnerable beneficiaries
- Self-managed Superannuation funds
- Death benefits
- Structuring issues associated with investments and asset protection.

Joanne's clients range from mums and dads with a simple structure, to high net-worth clients, and everything in between.

“It is important that I communicate in a manner which my clients understand. They need to understand the

documents they are signing and not be confused by legal terminology. “

Joanne is a member of Australian Succession Lawyers and the Chamber of Commerce Fortitude Valley. She is an Honorary Solicitor for the Cancer Council and the St Vincent de Paul Society.

Joanne is also a Notary Public.