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Estate planner joins Equity Trustees

Listed financial services company Equity Trustees Limited (EQT) has appointed Anna Hacker to the newly created role of senior manager – estate planning, reporting to Lachlan Wraith, head of personal estates and trusts at EQT.

Ms Hacker, who holds an honours degree in law, joins EQT from Moores Legal Ltd where her role included providing legal advice to accountants, financial planners and clients about estate planning. This involved drafting wills incorporating testamentary trusts, special disability and protective trusts; creating powers of attorney; and advising on superannuation, family trusts and life interests.

She is a member of the Law Institute of Victoria, the Business Professional Women's Association (where she was also secretary between 2008 and 2010) and the Probus Women's Housing Committee Board.

Mr Wraith said that the position was created to enhance the estate planning services at EQT at a time when there is an increasing demand from clients of financial advisers for sophisticated and tailored plans.

“As babyboomers reach retirement age, there is an increasing number of people recognising the need to start planning for how their estate will be distributed on their death.

“Many have complicated financial situations including superannuation, investment portfolios, as well as holding a significant asset in their family home. In addition, there is often the added complication of the family situation, perhaps through divorce and remarriage.

“As a result, we are increasingly hearing from financial planners who are seeking a comprehensive estate planning solution for their clients. Anna’s appointment ensures EQT can continue to provide the right support for advisers in the ongoing management of their client portfolios throughout the implementation of a sophisticated estate plan,” Mr Wraith said.

About Equity Trustees: *Equity Trustees is a publicly listed company that provides a range of financial services to corporate and private clients. Its businesses include private client wealth management, funds management, responsible entity appointments, and corporate and personal superannuation.*

The company manages over \$4 billion in its funds management, private client and superannuation businesses and has more than \$19 billion under responsible entity administration. Equity Trustees employs over 180 people in its Melbourne, Sydney and Brisbane offices.

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