

*Helping
good grow*

VOLUME

05





Much has changed in the five years since our inaugural Helping Good Grow. We have increased in size, deepened our expertise, enhanced our technological edge, and streamlined our operations in myriad ways for the benefit of clients and colleagues, alike.

We are proud of this progress but take even greater pride in what hasn't changed—the shared values that continue to guide our decision-making, and our continuing commitment to support purpose-aligned organisations and individuals.

WORKPLACE RELATIONS AND NOT-FOR-PROFIT

Supporting disability support organisations

Melba Support Services empowers people living with a disability to live the life they want. Being a large not-for-profit organisation can be challenging, and ready access to legal support is essential.

We have applied our expertise in not-for-profit law, workplace relations, and employment law to support Melba for many years. Our close alignment enables us to help them respond to unexpected challenges, deliver best practice structure and solutions, and fulfil their mission to assist vulnerable Australians in living their best life.

'The strong values alignment between our two organisations is immensely important to us.'

Rupert Evans
Manager, Industrial & Employee Relations,
Melba Support Services

SAFEGUARDING

Responding to sexual harassment

A residential college of an Australian university received multiple reports of sexual assault and image-based sexual abuse about a resident. Mindful of avoiding a lengthy and costly investigation process and the risk of potential harm to residents, the college sought our guidance on how to address the allegations.

Consistent with the policies and procedures Moores developed for them, we assisted the college to run a trauma-informed show cause process to remove the resident.

Our support enabled the college to terminate the respondent's residence quickly and effectively, with minimal risk of further harm. In line with the college's commitment to preventing and responding to sexual harm, Moores also facilitated a restorative process and provided training and education for staff and students on their rights and responsibilities.



EDUCATION

Managing risk

Lutheran Education VIC, NSW & TAS supports a large group of diverse schools on compliance and other key issues.

Moores helps them to manage risk in an increasingly regulated environment. We put student safety first when there are conflicting obligations, keep them informed of regulatory change, and provide practical recommendations to meet changing standards.

'Moores are highly skilled, easy to work with, and I trust them to do whatever they can to support us. I value their willingness to share and invest time to ensure we have everything we need.'

Tammy Hughes
Lutheran Education VIC, NSW & TAS

EDUCATION/NOT-FOR-PROFIT

Registering as an independent school

The Foundation Learning Centre is a not-for-profit, community-based education and social services organisation. Responding to increased regulatory oversight, they sought to register as an independent school—an onerous task further complicated by an extremely tight deadline.

Through the provision of expert advice and astute tailoring of the centre's existing documentation, our team of technical specialists ensured their goal was achieved—on time and on budget.

'It has been amazing to have the opportunity to work with Moores, and your wonderful staff. I would like to thank you for your thoughtful approach.'

Bron O'Callaghan
Foundation Learning Centre



PROPERTY

Helping to address homelessness

HousingFirst is a social housing provider. A Moores client for many years, they sought to partner with the Victorian Government and a private social impact investor to purchase 300+ apartments for re-purposing as affordable housing. When delivered, these new apartments will be available to Victorians who are at risk of homelessness or have experienced homelessness.

'As a long-term key partner of HousingFirst's, this was a significant project for us and Moores demonstrated exceptional legal expertise and dedication. Their insightful guidance on contract negotiations, tax exemptions, and compliance matters was invaluable in helping deliver our largest acquisition program to date'

Clive Bowden
Chief Commercial Officer
HousingFirst



ESTATE PLANNING

Securing self-managed super fund savings

Continual change to superannuation law had created uncertainty for our client, who questioned whether the hard-earned savings invested in their Self-Managed Super Fund (SMSF) would be compromised. We helped them navigate the changes, so they fully understood the impact to their SMSF. We also developed strategies to ensure their superannuation will be passed onto their nominated beneficiaries according to their wishes.

'The complexity of providing a comprehensive will that would best serve my daughters was a surprise to me. It became very clear Rowdy has a very good understanding of matters outside of family law relating to treatment of superannuation, testamentary trusts and property, and how best to provide a flexible and complying estate plan.'

Private Client

COMPLEX ESTATE DISPUTES

Honouring a charitable bequest

A will bequeathing the majority of a deceased estate to eight charities was contested by the deceased's son—he suffered from financial hardship, including homelessness, and was prone to public litigation. The matter was further complicated by the presence of a related family trust.

Moores represented all charity beneficiaries throughout the litigation, and across two mediations. Through careful, considered negotiations we achieved an outcome that respected the deceased's wishes: the charities retained their entitlement to the estate, and the son received a home from the family trust.

'Lachlan did a fantastic job managing a delicate bequest dispute, keeping multiple charities updated throughout.'

Charity Client

ESTATE PLANNING

Young family and a child with a disability

Our clients sought to create an estate plan that included appropriate provision and protection for their child with a disability, should they pass.

We discussed their wishes and helped them determine the appropriate structure and controllers. As part of their estate plans, their wills included testamentary trust provisions to ensure the necessary management and protection of their entitlements.

'Luke was attentive, responsive, considered, kind and gave very good advice and guidance. He was also prompt and provided us with great comfort that he would meet our tight timetable and the documents would adequately reflect our wishes.'

Private Client

ELDER FINANCIAL ABUSE AND HUMAN RIGHTS

Recovering misappropriated money

Our clients' father was highly dependent on a close family member, who persuaded him to transfer his bank account into joint ownership with them. When the father passed away, this prevented the fulfilment of gifts in their father's will.

Moore's issued a statement of claim seeking to recover the proceeds of the joint account and other assets, arguing they were the product of undue influence, or were otherwise unconscionable. We succeeded in resolving the matter at mediation, enabling the gifts made under the father's will to be effected.

'Thank you both so much for all your help. I've been so impressed by all your quality work, dedication, and strategy. It means a lot to me and my family.'

Private Client

DECEASED ESTATES

Administering a complex estate

Our clients' parent passed away leaving a large estate and various related entities. Among the assets were multiple residential and commercial properties, significant shareholdings, a private company, a self-managed superannuation fund, and several discretionary trusts.

Moores provided advice from the start—obtaining probate, then administering and distributing the estate. We liaised with third parties to arrange the sale of real estate, and established testamentary trusts for the beneficiaries as set out in the deceased's will.

Throughout, we worked closely with the clients and their accountant, to ensure everything was managed in a holistic manner.

'Thank you for your work seeing us through this process and especially your good humour.'

Private Client





HERE FOR GOOD

We are a values-driven law firm, here for like-minded organisations, causes and individuals. Our passionate, service-focused experts empower clients through smart, innovative solutions.

We are Moores, and we're here for good.

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