

*Helping
good grow*



VOLUME

02





In 2020, a year unlike any in our long history, Moore's has continued to support the purpose-aligned organisations and individuals we so proudly call our clients. 'Helping good grow' showcases some of the challenges they've faced, and the legacy of positive change our work has enabled.

CHARITY

Growing affordable housing

A faith-based client sought to have an organisation providing affordable housing registered as a charity. The Australian Charities and Not-for-profits Commission (ACNC) deemed their eligibility criteria 'too generous', however, and the initial application was rejected.

Moore's helped the client expand its assessment criteria. We also provided explanatory material to assist the ACNC with their consideration. Successful at the second attempt, the now registered charity is growing and has great plans to provide much-needed affordable housing.

TESTIMONIAL:
FAMILY LAW

Understanding when to litigate

Our client wished to separate from her husband. After he elected to self-represent, we were unable to negotiate a fair or reasonable outcome.

While Moores' preference is always to resolve client matters without litigation, we identified early on that it would be the most appropriate course of action in this case. Within six months of issuing court proceedings, the matter resolved favourably for our client.

'You have been phenomenal throughout this whole process, keeping things calm and my emotions under control. I'm grateful for the outcome and your assistance and help along the way.'

Family Law Client



WILL DISPUTES

Being left out of a will

Our client was left out of her mother's will. Made only a few days before the mother's passing, the will named the client's only sibling as sole beneficiary of an estate.

Moores helped the client understand the circumstances in which the will was made, then assisted in making a family provision claim from the estate.

We proposed a voluntary mediation which yielded a rapid, extremely positive outcome, and avoided lengthy and costly litigation. The client received a large sum and items of great sentimental value, including irreplaceable childhood photos.

'Erika was very helpful and incredibly patient. She is a credit to your firm and I would certainly recommend Moores to anyone who needed advice and help in these types of matters.'

Client

PROPERTY AND CONSTRUCTION

Making safe, secure housing a reality for more Victorians

Moores is working with a social housing provider on a new, multi-stage social housing development with a capital budget of approximately \$50 million. When complete, it will provide accommodation to those most in need.

Engaged to help the client make the best decisions, we will advise throughout the project on a range of issues, including consultant engagement, building contract preparation and negotiations with the Victorian Government, which is one of the major funding sources.

TESTIMONIAL:
EDUCATION

Helping schools respond to COVID-19

In response to COVID-19, Moore's worked quickly with a number of peak bodies, including the Association of School Business Administrators and Independent Schools Victoria. We communicated vital information to many hundreds of schools, simplifying complex guidelines—such as 'return to campus' protocols—into practical steps.

'Our members emanate from a diverse range of independent schools all across Victoria; many with limited support networks or limited capacity to engage law firms.

From transport and cleaning contract arrangement to child safety strategies in the online environment, the advice Moore's provided was well received and created a reassuring sense of logic, understanding and calm.'

Mark Glover
Vice President
Association of School Business Administrators Victoria



GOVERNANCE

Enabling best practice

With new faces on their board and a newly appointed CEO, this public benevolent institution sought to ensure its governing document was up to date. After assessing the document thoroughly, Moores recommended a complete replacement.

We tailored the new document to support best practice governance while also meeting the organisation's unique needs. It incorporated the more flexible provisions now available to registered charities, and appropriate reference to the role of the Australian Charities and Not-for-profits Commission.

Moores also assisted with strategic communications to ensure members could easily understand the key changes and the rationale for their adoption.

ELDER LAW

Remedying financial abuse

Moores worked with two siblings concerned their mother's finances were being mismanaged by her attorney. Soon after, their mother passed away, but we continued to act in relation to the deceased estate.

Our investigations uncovered financial and legal documents concerning their late mother's complex affairs. Analysis revealed the attorney had indeed breached their duties in significant and material ways throughout their mother's lifetime.

As a result of our strategic approach and forensic investigation, their late mother's assets were restored. The attorney was held to account and required to return funds to the deceased estate.

NOT-FOR-PROFIT

Providing pro bono support in unprecedented times

Throughout 2020, Moores helped the not-for-profit sector respond to the critical and immense operational changes resulting from the pandemic.

In partnership with Our Community, we first developed a complimentary epidemic-pandemic policy template to help organisations prepare for the onset of COVID-19. As the pandemic progressed, we developed a second template to help organisations protect themselves from the increased risk of ransomware attacks and privacy breaches.

Combined, the templates were downloaded more than 4,000 times.

WILLS AND ESTATE PLANNING

Using an inheritance to the best advantage

After receiving a \$550,000 inheritance, our client learnt she was no longer entitled to her pension and health care card. Instead of providing for her family in the long-term, the inheritance would now have to pay for life's necessities.

As her son had an intellectual disability, Moores advised that gifting some or all of the inheritance into a Special Disability Trust could prevent the loss of pension. We also showed the trust could pay for many of her son's expenses, freeing up more of his disability support pension.

We prepared the documentation required to establish the trust, and assisted in lodging the paperwork required by Centrelink. We also prepared a will that takes into account the funds gifted into trust, when dividing her estate between her children.

TESTIMONIAL:
POWER OF ATTORNEY — PROPERTY

When every second counts

'My mother-in-law, Elizabeth, bought a new house. Settlement was due on the Wednesday, but on the Monday, she tripped, broke her pelvis and wound up in hospital.

Although I had Power of Attorney, the bank refused to proceed. With less than 24 hours to go, I called Rachael Lagana at Moores. The situation seemed hopeless, but Rachael rearranged all of her meetings and appointments and made her way to Elizabeth's bedside with new paperwork for signing.

Long story, short, settlement took place as planned the next day. Without Rachael's genuine care, her desire to make things happen, and can-do attitude, it would never have happened.'

Michael Chong



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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