Arnold Bloch Leibler
Lawyers and Advisers

Joey Borensztajn, BEc LLB (Monash)

Partner

- commercial and corporate law
- taxation law
- private clients
- business and succession planning
- structuring of business and investment vehicles
- philanthropy and charitable giving

Joey Borensztajn has over 30 years' experience in commercial and taxation law. He is a commercial lawyer with an extensive private client practice and has a deep knowledge of taxation, trusts, philanthropy and charitable giving, and estate and business succession planning. Joey has a quiet, understated approach, which belies his very achievement-focused practice. He has an outstanding rapport with clients who seek him out for his vast commercial experience and skills in taxation law, including tax advice, planning, audit and dispute work. Joey's commercial practice also involves strategic planning, structuring and the implementation of acquisitions and joint ventures.

Joey is noted in *Legal Profiles*, an independent review of Australian legal firms as 'always delivering and having patience and perseverance' and having 'an outstanding commerciality, tremendous depth of expertise and experience'. Joey attracts a considerable amount of referral work from other professional service providers who seek his advice, or work in concert with him to deliver clients comprehensive wealth management advice.

Practice focus

Joey is a member of the commercial & corporate, taxation and private client groups. His practice focuses on the following areas:

- commercial and corporate law, including corporate structuring and restructuring, acquisitions, joint ventures and governance issues;
- taxation, stamp duty and land tax issues;
- strategic planning and the structuring and implementation of appropriate business and investment vehicles, including trusts and advising on and documenting shareholder, unitholder and joint venture agreements;
- private clients, estate, tax and trusts planning;
- business succession planning, including asset and business succession and control, succession documentation for trusts and companies, and family and governance agreements and constitutions; and
- philanthropy and charitable giving, including establishment of special purpose philanthropic entities and private ancillary funds (PAFs).

Major assignments

Joey has acted for private family groups, high-net-worth individuals and corporations in a range of corporate and taxation matters, including:

- medical groups and allied professionals: making recommendations in relation to structuring, acquisitions and sales;
- commercial property owners: dealing with enquiries by the State Revenue Office aimed at the grouping or aggregation of client entities or the application of the land rich provisions for land tax purposes;
- high-net-worth families: in relation to estate planning and business succession;
- educational and charitable organisations: taxation, structuring and other corporate advice, with a significant proportion of advice given on a pro bono basis;
- ATO tax audits: advising on, negotiating and settling large cases and high wealth audits;
- tax structuring and planning advice, including obtaining private rulings on proposed transactions from the ATO and effective structuring of transactions to minimise adverse tax consequences; and
- tax deductible and other charitable foundations: establishment of PAFs and other charitable giving vehicles. Joey has been pivotal in the establishment of a significant number of PAFs.

Memberships and associations

Joey has a strong commitment to the Jewish community, which is reflected in the public positions he has held, including membership of the executive committee of the Mount Scopus Memorial College Foundation. Joey is a trustee of the Jewish Holocaust Centre Foundation and also acts as the trustee of a number of client PAFs. Joey is also a director of Collingwood Football Club Foundation Limited.

To contact Joey Borensztajn

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