

Sladen Legal **drives results**



Principal Lawyer

Bernie O'Sullivan



Chartered Tax Advisor
Associate Executor & Trustee Institute
Affiliate Securities Institute of Australia

One of Australia's leading estate planning lawyers, Bernie has over 40 years' experience advising individuals, family groups and businesses on all aspects of estate and business succession.

Often acting as advisor to prominent families, Bernie's knowledge of family trusts, superannuation and estate and elder law enables him to provide clear, practical solutions for clients with complex family and asset structures. He is often asked to provide a second opinion on existing succession plans.

Bernie's background with trustee companies and large law firms saw him commence his own law firm in 2011 which quickly gained a reputation as a pre-eminent estate planning firm before merging into Sladen Legal in 2019.

Accountants, financial planners and other advisers regularly refer clients to Bernie because of his collaborative approach and plain-English advice.

Bernie is lead author of Estate and Business Succession Planning, widely regarded as Australia's leading text on succession planning, now in its 8th edition. He is a sought-after public speaker by many professional and educational bodies.

Bernie recognised by Best Lawyers 2025 as the "Lawyer of the Year" for Trusts and Estates in Melbourne. An extraordinary accolade for Bernie's work in the field of Estate Planning and Business Succession. "Lawyer of the Year" awards are bestowed to only lawyers with the highest overall peer feedback for a specific practice area and geographic region. Bernie has also been recognised in Doyles Guide as a Preeminent Wills & Estates lawyer since 2020.

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Bernie's areas of practice include:

- Complex estate and incapacity planning
- Family trusts
- Superannuation including SMSFs
- Business succession
- Asset protection
- Disputes and litigation
- Family Office advice
- Taxation
- Charitable Trusts

Professional associations and publications:

- The Law Institute of Victoria
- The Tax Institute
- Society of Trust and Estate Professionals (STEP)
- Lead Author, Estate and Business Succession Planning, ISBN: 978-0-9925810-8-4 published by The Tax Institute
- Deakin University Lecturer and Author, Estate Planning (undergraduate and postgraduate)
- KAPLAN Insurance, Succession and Estate Planning module co-author

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