

STAMP DUTY SERVICES

A&M's Stamp Duty Services team helps clients plan, manage and comply with this transaction-based tax across all eight Australian jurisdictions. Any transaction, including asset deals like property, insurance and acquisitions of a business as well as entity transactions, must be fully understood to properly assess any stamp duty liability. Issues to consider include identifying goodwill value, and intangible rights, or what are the underlying Australian "land type" assets for an entity transaction as well as their value. A&M's Stamp Duty team has the experience and knowledge to ensure clients are not overpaying the amount of stamp duty on assets sold, bought or leased or entities acquired.

WHO WE HELP

Infrastructure

Renewables

Resources

Public-Private Partnerships

Private Equity

Mergers & Acquisitions

Financial Services

Aged Care & Retirement Villages

WHY OUR CLIENTS CHOOSE US

Expertise: We offer deep stamp duty experience across all eight of the Australia jurisdictions. We are experienced specialists in this area and are known in the market for this reason. Clients trust us to advise them on identifying and managing stamp duty issues on transactions to prevent surprises.

Client Readiness: Our team prepares the client so they are thinking proactively about how they can implement a transaction in a stamp duty efficient manner, considering all commercial, legal and tax considerations.

One-Stop Tax Shop: A&M integrates all tax work with its transaction services, so clients can rely on us to provide due diligence, structuring, compliance and recommendations on the best ways to conduct a transaction.

Best Possible Outcomes: Our advocacy on behalf of our clients aims to establish the best overall outcome when managing a stamp duty issue. In this trusted advisory role, we serve as the client's advocate to obtain signoffs from revenue authorities with minimal pain and to clearly communicate any issues with stakeholders if they arise.

Proprietary Data and Knowledge: We are able to quickly evaluate any stamp duty exposures and our familiarity with the rates and rules in all Australian states and territories, allows us to quickly advise a client regardless of the size of the business assets or entity being acquired or restructured.

A&M TAX APPROACH



Overview

We work closely with the client to understand the nature of their organisation and their potential future plans, as this helps determine whether they will pursue a transaction in the future and its timing. Understanding if any stamp duty revenue authority has made inquiries into the company's past stamp duty liabilities will also be important.



Assessment

We ask the client for background and transaction information so we can review and analyse. As stamp duty is both an instrument- and a transaction-based tax, we will review key documents to understand any issues and the appropriate way of managing them.



Report

We provide a review of the transaction(s) sequence and high-level stamp duty comments and recommendations for the proposed transaction(s), which are suitable as backup documentation for key internal stakeholders and third parties, like lenders.



Negotiation

A&M is familiar and has relationships with the Revenue Offices across Australia and can negotiate on your behalf to resolve compliance or technical issues that may arise.

THE A&M DIFFERENCE

OPTIMIZE TAX SAVINGS

Stamp duty can be up to 6.5% of a transaction's asset value as it is imposed on the greater of market value or consideration paid. Identifying which attributes may be appropriate under the stamp duty rules and which are not subject to duty can ensure you're not overpaying.

MITIGATE RISK

Aligning with regulatory lodgement requirements reduces compliance risks, and dealing with revenue authorities using a prompt and documented approach can assist in mitigating the imposition of interest and penalties — which can be substantial on top of the initial stamp duty liability.

PREVENTING DOCUMENTATION TRIP WIRES

We ensure clients' transaction documentation does not inadvertently trigger additional exposures to stamp duty as this has happened in the past for other taxpayers due to inappropriate wording / clauses.

PEACE OF MIND

We prepare the necessary documentation to negotiate with the relevant Revenue Offices to present our position on the stamp duty liability. For example, an intangible asset may not be viewed as goodwill but instead, it may be an organization's confidential information or management know-how that arguably falls outside the stamp duty net.

CONTACT US



Robert Nguyen
Managing Director

+61 402 355 616
rnguyen@alvarezandmarsal.com



Stefan DeBellis
Managing Director

+61 0419 628 714
sdebellis@alvarezandmarsal.com



Gareth Mak
Director

+61 434 269 728
gmak@alvarezandmarsal.com

ABOUT ALVAREZ & MARSAL

Companies, investors, and government entities around the world turn to Alvarez & Marsal (A&M) for leadership, action and results. Privately held since its founding in 1983, A&M is a leading global professional services firm that provides advisory, business performance improvement and turnaround management services. When conventional approaches are not enough to create transformation and drive change, clients seek our deep expertise and ability to deliver practical solutions to their unique problems.

With over 9,000 people providing services across six continents, we deliver tangible results for corporates, boards, private equity firms, law firms and government agencies facing complex challenges. Our senior leaders, and their teams, leverage A&M's restructuring heritage to help companies act decisively, catapult growth and accelerate results. We are experienced operators, world-class consultants, former regulators and industry authorities with a shared commitment to telling clients what's really needed for turning change into a strategic business asset, managing risk and unlocking value at every stage of growth.

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