Local Tax Club Series – Adelaide

15 CPD hours (1.5 CPD hours per session)

Keep up to date with the latest developments in all areas of tax.

With a local and topical line-up of sessions and presenters, the Local Tax Club Series will deliver quintessential and hot topics which affect you and your clients.

This series includes 10 sessions delivered locally to you. With each session featuring a specialist tax topic presented by experts in their fields and a monthly tax update to keep you abreast of Australia's ever changing tax legislation, being part of your Local Tax Club will not only keep you on top of the latest tax knowledge but will connect you with your peers, and fellow members of your tax community.

Take advantage of our subscription package, with special discounts and incentives for Local Tax Club Series subscribers as well as making registrations for the year much easier.

Subscribe now and join us at your Local Tax Club!

Registration options

1. **Full Series Subscription** – choose to be automatically registered to attend each of the 10 monthly Local Tax Club sessions so there is no need to fill out the registration form for each session. If you are unable to attend a session, you may nominate someone else from your firm as your replacement.

2. **Individual sessions** – tailor your attendance by simply indicating your preferred session/s on the registration form overleaf.

Please note this is a paperless event, the materials will be emailed to you the day prior.
If you purchase a member registration, you may send a non-member from your firm. Please note that the difference in registration fee will be charged to the attendee.

All subscriptions are valid for 2022 only. Please see the registration page for registration options.

At The Tax Institute, the health and wellbeing of our employees, members and delegates is our top priority. To read more information on our COVID-19 event guidelines and cancellation policy, please click here.

2022 schedule

Tuesday 22 February
Tuesday 22 March
Tuesday 12 April
Tuesday 24 May
Tuesday 21 June
Tuesday 26 July
Tuesday 23 August
Tuesday 20 September
Tuesday 25 October
Tuesday 22 November

Session details

Time: 5.30 – 7.00pm
Venue: Arkaba Hotel
150 Glen Osmond Road
Fullarton SA 5063

CPD proficiency level:

Proficient

Register now:

taxinstitute.com.au/localtaxclub

For event queries please contact:

@ anniedaryani@taxinstitute.com.au

+61 08 8463 9444

Sessions

Date	Session	Presenter
Tuesday, 22 February	Part 1: M&A issues and trends for the SME sector Recent legislation, cases and ATO rulings are influencing tax outcomes of M&A transactions. This session will consider M&A issues and trends in the SME sector, including: – New due diligence matters regarding fixed asset stimulus measures – The capital / revenue distinction in light of the recent Clough case – Some differences between a share deal and an asset deal – The ATO's views on the availability of certain roll-overs – The deductibility of transaction costs.	Julian Lian KPMG Tax Update Presenter: Angelica Caruso KPMG
Tuesday, 22 March	Part 2: In Our Sights This informative session will provide insights into the tax policy and administration matters currently in the sights of the Tax Policy and Advocacy team at The Tax Institute. Join our Senior Advocate, Robyn Jacobson, CTA, as she shares her insights and practical tips on matters that affect your clients. The session will include a discussion on the following key matters: – Looking ahead to the Federal Budget 2022–23 and the Federal election – Tax reform: update on Case for Change – Recent submissions and advocacy work – Key pending ATO guidance and consultation	Robyn Jacobson, CTA The Tax Institute Tax Update Presenter: Nicholas McCann WRP Legal & Advisory
Tuesday, 12 April	Part 3: Topic to be announced	Sean van der Linden, CTA EY
Tuesday, 24 May	Part 4: Beyond Bitcoin: Modern Topics in Cryptocurrency for Tax and Estate Planning Introductory explanations to blockchains was very 2015. The questions that your clients will ask you in 2022 will involve such things as wrapping cryptocurrencies, staking rewards and liquidity pooling. What answers will you have for them on how they can deal with these transactions for the purposes of tax, trusts and commercial law, and estate planning? Adrian Cartland and Jarod Winders will discuss practical examples with solutions and make suggestions on how various problems can be solved.	Adrian Cartland Cartland Law Jarod Winders Hopscotch Wealth Tax Update Presenter: Joseph Primerano Cartland Law

Presenter profiles

Led by tax practitioners for tax professionals

Adrian Cartland, is a taxation and commercial lawyer and Principal of Cartland Law. He specialises in devising novel solutions to complex trust, equity, partnership and contract law issues and transactions. He is experienced in all the State taxes, particularly stamp duty and land tax, and advises across the full range of Federal taxes.
Adrian is also the Creator of Ailira, the Artificially Intelligent Legal Information Research Assistant, which automates legal research and advice in the areas of tax law, business structuring, estate planning and domestic violence. Adrian is known for his innovative advice and ideas and also for his entertaining and insightful professional speeches.

Angelica Caruso is an Assistant Manager in the KPMG Adelaide Corporate Tax team. Angelica holds a Bachelor of Commerce (Accounting) and a Bachelor of Laws with the University of Adelaide. Angelica is a Provisional Member of the Institute of Chartered Accountants and a Chartered Tax Adviser with the Taxation Institute of Australia. Angelica has experience working primarily in corporate tax compliance and advisory. Angelica has worked with a diverse range of clients in financial services, property and primary production industries.

Robyn Jacobson, CTA is the Senior Advocate at The Tax Institute. She has nearly three decades in the profession, including a public practice background which preceded her various training roles over 23 years. Robyn continues to be a regular conference and webinar presenter, and is an avid advocate, social media commentator, columnist, blogger and podcaster. She is also regularly quoted in the media. Robyn is a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. She regularly consults with the Treasury, ATO and professional bodies on technical issues including as a member of the ATO's Tax Practitioner Stewardship Group. Robyn was recognised in the Women In Finance Awards 2019 as the Winner of Thought Leader of the Year and was named in the global Top 50 Women in Accounting 2019. She was recognised in the Australian Accounting Awards 2020 as the Winner of both Thought Leader of the Year and the Accountants Daily Excellence Award.

Julian Lian is a Director at KPMG, where he started as a graduate in 2006. He has a broad range of experience, having worked in KPMG's Sydney office where he focused on energy and resources and renewables, and a leading Australian law firm where he focused on mergers and acquisitions. Julian is currently assisting a number of SME clients through mergers and acquisitions.

Nicholas McCann is a Senior Associate at WRP Legal & Advisory. Nicholas has extensive experience in taxation advisory as well as tax dispute resolution and lodging submissions with federal and state revenue authorities. Nicholas regularly advises on commercial transactions, in particular taxation planning and structuring, asset acquisitions and disposals, taxation compliance, not-for-profit organisations, restructures and transactional advice.
Nicholas works with senior and junior practitioners and other professional advisors to provide advice on a wide range of corporate, commercial and taxation issues (at both federal and state level), to a broad range of clients including private high-net-worth individuals, family groups, large companies (including ASX listed companies) and not-for-profit organisations.
Nicholas is also a member of the Law Society of South Australia and the Golden Key International Honour Society (Law and Commerce). In addition to his role at WRP Legal & Advisory, Nicholas tutors Financial Accounting in the Adelaide University Business School.

Joseph Primerano, is an Associate Solicitor at Cartland Law specialising in Tax Law. Joseph's key areas of practice include Goods and Services Tax, Division 7A, Business Restructuring, Small Business Entity Concessions and Trusts. Joseph is also a Chartered Accountant with over six years' experience in public accounting, assisting clients with both business and personal tax matters.

Refund Policy – COVID-19

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

If a registered delegate is unable to attend as a result of a diagnosis of COVID-19 or they are experiencing symptoms of COVID-19, a full refund will be offered with the provision that a medical certificate is produced explaining the diagnosis or a summary of the appropriate action to be taken i.e. a COVID-19 test and medical advice.

If a registered delegate is unable to attend a face-to-face event as a result of interstate border closures or they reside in or visited a COVID-19 hotspot, we will endeavour to transition the registration to an online registration for the event. If there is a difference in price a credit will be provided to delegates to be used at a future event. If a delegate does not wish to transition their registration to the alternate online event, a full refund/credit will be provided.

Refund Policy – General

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee. The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

THE TAX INSTITUTE

Local Tax Club Series – Adelaide

Registration form

42364 | WD

A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

1 Registration

Please select your registration type:

	Member	Non-member
Full series (10 sessions)	☐ $750 ($75 per session)	☐ $1,000 ($100 per session)
Individual sessions	☐ $125 x ☐	☐ $150 x ☐

Please select your session/s below:

☐ Part 1 – Tues, 22 Feb (42365) ☐ Part 2 - Tues, 22 Mar (42366) ☐ Part 3 – Tues, 12 Apr (42367)

☐ Part 4 – Tues, 24 May (42368) ☐ Part 5 – Tues, 21 Jun (42369) ☐ Part 6 – Tues, 26 Jul (42370)

☐ Part 7 – Tues, 23 Aug (42371) ☐ Part 8 – Tues, 20 Sep (42372) ☐ Part 9 – Tues, 25 Oct (42373)

☐ Part 10 – Tues, 22 Nov (42374)

Dietary requirements: ………

For event enquiries, please contact Annie Daryani on 08 8463 9444 or anniedaryani@taxinstitute.com.au.
1.5 CPD hours allocated for each session. CPD hours will be allocated to the designated attendee.

2 Delegate contact details

If your member details are up-to-date, you can skip this section

Member no.: ______________________

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms

First name: ______ Last name: ______

Position: ______ Company: ______

Address: ______

Suburb: ______ State: ______ Postcode: ______

Telephone: ______ Mobile: ______

Email: ______

☐ Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking purposes.

3 Payment method

☐ Cheque payable to The Tax Institute (in Australian dollars)

☐ Credit card $ ______ Card type: ☐ AMEX ☐ Visa ☐ MasterCard ☐ Diners

Name on card: ______

Card no.: ______ Expiry date: M M / Y Y Cardholder's signature: ______

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

Collection notice

TO REGISTER

Online taxinstitute.com.au

Email customeradmin@taxinstitute.com.au

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