

Local Tax Club Series – Brisbane

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 for breakfast at your Local Tax Club!

Registration options

1. **10 session subscription** – choose to be automatically registered to attend each of the 10 monthly Local Tax Club sessions or you can share the credits with your colleagues over the year and nominate month to month who will be attending each session.
2. **Individual sessions** – tailor your attendance by simply indicating your preferred session/s on the registration form overleaf.
3. **Company Subscription** – pre-purchase session credits to be spread across your firm throughout the year at a discounted price (minimum of 10). Each month nominate the names of the delegate/s you wish to register, and we take care of the rest. You can top up your session credits at the discounted rate at any time.

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, please [click here](#).

2022 schedule

Wednesday 23 February

Wednesday 23 March

Wednesday 27 April

Wednesday 25 May

Wednesday 22 June

Wednesday 27 July

Wednesday 24 August

Wednesday 28 September

Wednesday 26 October

Wednesday 23 November

Session details

Time: 7.30 – 9.00am

Venue: Cliftons, 24/288 Edward St
Brisbane

CPD proficiency level:

Proficient 

Register now:

taxinstitute.com.au/localtaxclub

For event queries please contact:

@ charlottebernasconi
@taxinstitute.com.au

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Sessions

Date	Session	Presenter
<i>Wednesday 23 February</i>	Part 1: In Our Sights <p>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.</p> <p>The session will include a discussion on the following key matters:</p> <ul style="list-style-type: none"> – 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 <p>The Tax Institute</p> <p>Tax Update presenter: Thomas Aikenhead Hoffman Kelly</p>
<i>Wednesday 23 March</i>	Part 2: Personal Services Income Rules – not a case of set and forget <p>These rules have been with us for a long time now but there is still plenty to beware of.</p> <p>This session will discuss tips and traps when dealing with clients deriving income from personal services.</p>	John Ioannou, CTA Macpherson Kelley <p>Tax Update Presenter: Elizabeth Allen Macpherson Kelley</p>
<i>Wednesday 27 April</i>	Part 3: Topic to be announced	
<i>Wednesday 25 May</i>	Part 4: Topic to be announced	



Presenter profiles

Led by tax practitioners for tax professionals

Thomas Aitkenhead is a Director at Hoffman Kelly. Tom has degrees in Commerce and Law and has over 18 years' experience in public practice providing structuring and taxation solutions for SME businesses. Tom has a special interest in the property industry and its ever-changing and complex nature. He enjoys finding practical solutions for his clients.

Elizabeth Allen, ATI is a Senior Associate at Macpherson Kelly. She acts for a wide range of private, corporate and HNWI clients with a primary focus on tax structuring and tax dispute work, concentrating on the delivery of outcomes and solutions that give her clients the confidence to keep doing what they do best. Elizabeth also acts for clients on various commercial matters including business sales and acquisitions.

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.

John Ioannou, CTA was admitted as a Solicitor in 2002 and is a Principal Lawyer at Macpherson Kelley. He has experience in the areas of taxation, structuring, commercial transactions, disputes, trusts and estates, succession and asset protection planning. John has a Bachelor of Arts, Bachelor of Laws and a Master of Law. He is Chair of the Tax Institute's Queensland's State Council in addition to being a State Councillor.

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

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Registration form

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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)	<input type="checkbox"/> \$750 (\$75 per session)	<input type="checkbox"/> \$1,000 (\$100 per session)
Individual sessions	<input type="checkbox"/> \$125 x <input type="text"/>	<input type="checkbox"/> \$150 x <input type="text"/>
Please select your session/s below:		
<input type="checkbox"/> Part 1 – Wed, 23 Feb (42381)	<input type="checkbox"/> Part 2 – Wed, 23 March (42387)	<input type="checkbox"/> Part 3 – Wed, 27 April (42388)
<input type="checkbox"/> Part 4 – Wed, 25 May (42389)	<input type="checkbox"/> Part 5 – Wed, 22 June (42390)	<input type="checkbox"/> Part 6 – Wed, 27 July (42391)
<input type="checkbox"/> Part 7 – Wed, 24 Aug (42392)	<input type="checkbox"/> Part 8 – Wed, 28 Sep (42393)	<input type="checkbox"/> Part 9 – Wed, 26 Oct (42394)
<input type="checkbox"/> Part 10 – Wed, 23 Nov (42399)		

Corporate subscriptions available - Tailor a package for specifically for your firm of pre-purchased session credits to use throughout the year at a discounted price. For more information on corporate subscriptions please contact charlottebernasconi@taxinstitute.com.au

Dietary requirements:

For event enquiries, please contact Charlotte Bernasconi on 02 8223 0075 or charlottebernasconi@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: Cardholder's signature:

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

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

TO REGISTER

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