THE TAX INSTITUTE

Local Tax Club Series – Parramatta

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

Thursday 17 February
Thursday 17 March
Thursday 28 April
Thursday 12 May
Thursday 23 June
Thursday 21 July
Thursday 18 August
Thursday 22 September
Thursday 27 October
Thursday 17 November

Session details

Time: 7.30 – 9.00am
Venue: Spry Roughley Services
Level 5, 3 Horwood Place, Parramatta

CPD proficiency level:

Proficient

Register now:

taxinstitute.com.au/localtaxclub

For event queries please contact:

@ charlottebernasconi@taxinstitute.com.au

+61 02 8223 0075

Sessions

Date	Session	Presenter
Thursday, 17 February	**Part 1: 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: **Alice Kwan** Brown Wright Stein
Thursday, 17 March	**Part 2: Taxing the family home (part 1)** The session will provide a refresher on the CGT main residence exemption using practical scenarios to examine the traps and opportunities. Many believe that a sale of the family home is not taxed but the main residence exemption rules are complex and unexpected outcomes can occur. Fundamental concepts will be considered through the scenarios including: – The meaning of "main residence" and practical guidance on making a dwelling a main residence; – Circumstances when the exemption will be unavailable or reduced; – The operation of the absence rule and how it interacts with short term letting; – How the rules are applied when dwellings are constructed or renovated; and – The operation of the main residence exemptions for deceased estates and the ATO's recent approach to the 2 year rule.	**Matthew McKee, FTI** Brown Wright Stein Tax Update Presenter: **Kelly McNeil** First Equity Taxation
Thursday, 28 April	**Part 3: Taxing the family home (part 2)** This session continues on from Part 1, and provides a refresher on the land tax principal place of residence exemption, using practical scenarios to examine the traps and opportunities. The session will also consider the CGT main residence exemption where a taxpayer becomes a non-resident. Concepts that will be considered through the scenarios include: – The meaning of "principal place of residence" for land tax and the general requirements; – The application of land tax when moving homes; – How the land tax rules are applied when dwellings are constructed or renovated; – Generating income from the family home and absences; and – Moving overseas – are the CGT and land tax concessions available, and will surcharge land tax apply?	**Jim Koutsokostas, CTA** Hall & Wilcox Tax Update Presenter: **Todd Bromwich** Hall & Wilcox

Date	Session	Presenter
Thursday, 12 May (1.5-hour topic presentation)	**Part 4: Year-end Tax Planning** The tax and superannuation landscape is in a constant state of change. There are numerous government announcements, new bills, new legislation, cases, rulings and other ATO publications being released on a regular basis. It is difficult for practitioners to keep up to date let alone incorporate all of these changes into their planning strategies for their clients. This presentation will provide practitioners with an opportunity to learn about the more recent changes, and how they impact upon planning for clients.	**Jo-anne Hotston, CTA** TaxBytes

Presenter profiles

Led by tax practitioners for tax professionals

Todd Bromwich is a lawyer in the Hall & Wilcox Tax Team, with a broad range of experience including advising on tax planning and structuring for small-to-medium businesses and high net-worth family groups, disputes with Federal and state revenue authorities, income tax and CGT matters, and the not-for-profit sector.

Jo-anne Hotston, CTA is a director of TaxBytes, a Knowledge Shop Company, which is a specialised in house tax training business. She is a Fellow of the Institute of Chartered Accountants and a Charted Tax Adviser of The Tax Institute and holds a Masters in Taxation from the University of Sydney. Jo-anne has been providing tax training to accounting and legal firms since 1994 from first tier firms down to smaller firms. She provides monthly tax training to a number of accounting firms throughout Australia. She has had extensive experience as a presenter in taxation matters and has been a regular presenter for the ICAA and TTI.

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.

Jim Koutsokostas, CTA is a special counsel at Hall & Wilcox. He has over 15 years' experience providing taxation advice on a broad range of corporate and trust tax matters, with a particular focus on the banking and finance, government, and property and construction sectors. Jim's expertise extends to all areas of tax law, and his experience includes advising on the tax aspects of securitisation structures, onshore and offshore fund establishment, and collective investment vehicles, including managed investment trusts. He has also advised domestic and foreign financiers on the direct and indirect tax aspects of transactions with respect to distressed entities.

Alice Kwan is a lawyer at Brown Wright Stein Lawyers practising predominantly in tax law and trusts. Alice works closely with the Partners at Brown Wright Stein to provide tailored advice in relation to State and Federal taxation matters, property transactions, business restructuring and succession. Alice has had experience in making ruling applications, and has enjoyed assisting with managing the conduct of audits and preparing objections.

Matthew McKee, FTI is a partner of the Sydney law firm Brown Wright Stein Lawyers. Matthew assists accountants and lawyers in advising their clients on all aspects of tax and superannuation for SMEs and high net wealth individuals and family groups

Kelly McNeil is a Partner at First Equity. Having spent 12 years working with private clients and family offices in Big 4 and mid-tier firms, Kelly brings a wealth of experience in taxation advisory and compliance services. Kelly works closely with a broad range of clients to develop tailored and effective solutions for managing their tax and financial affairs. Kelly is a Chartered Accountant and holds a Master of Taxation and a Bachelor of Commerce from the University of NSW.

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.

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Registration form

42268 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)	☐ $850 ($85 per session)	☐ $1,100 ($110 per session)
Individual sessions	☐ $135 x ____	☐ $160 x ____

Please select your session/s below:

☐ Part 1 – Thurs, 17 Feb (42269)
☐ Part 2 - Thurs, 17 March (42270)
☐ Part 3 – Thurs, 28 April (42271)
☐ Part 4 – Thurs, 12 May (42272)
☐ Part 5 – Thurs, 23 June (42273)
☐ Part 6 – Thurs, 21 July (42274)
☐ Part 7 – Thurs, 18 Aug (42275)
☐ Part 8 – Thurs, 22 Sep (42276)
☐ Part 9 – Thurs, 27 Oct (42277)
☐ Part 10 – Thurs, 17 Nov (42278)

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: MM/YY 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 TTIs 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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