THE TAX INSTITUTE

Local Tax Club Series – Melbourne CBD

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 individual subscription (Full series)**– choose to be automatically registered to attend each of the 10 monthly Local Tax Club sessions.
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. To purchase a Company Subscription for your firm, please contact britneymcilvain@taxinstitute.com.au

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, 3 March 2022
Thursday, 24 March 2022
Thursday, 28 April 2022
Thursday, 19 May 2022
Thursday, 23 June 2022
Thursday, 28 July 2022
Thursday, 25 August 2022
Thursday, 15 September 2022
Thursday, 27 October 2022
Thursday, 24 November 2022

Session details

Time: 7.30 – 9.00am
Venue: Leonda by the Yarra & Online
2 Wallen Rd, Hawthorn 3122

CPD proficiency level:

Proficient

Register now:

taxinstitute.com.au/localtaxclub

For event queries please contact:

@ britneymcilvain@taxinstitute.com.au

+61 03 9603 2007

Sessions

Date	Session	Presenter
Thursday, 3 March	**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: **Frank Hinoporos, CTA** Hall & Wilcox Lawyers
Thursday, 24 March	**Part 2: Do you have trust issues?** Given the increased use of family trusts, and a number of recent cases around trust disputes, being across common issues is even more important for practitioners working with clients in this area. This session will provide an update on recent cases and developments concerning family trusts and practical tips to manage issues, including: – Variations – Exercise of discretion – Succession of control – Removal of beneficiaries – Issues with establishment of trusts – Dealing with foreign persons and duty / land tax considerations	**William Moore** Hall & Wilcox Lawyers Tax Update Presenter: **Frank Hinoporos, CTA** Hall & Wilcox Lawyers
Thursday, 28 April	**Part 3: Windfall Gains Tax, Build to Rent and other recent developments in state taxation** Session information coming soon.	**Simon Tisher, CTA** Victorian Bar Tax Update Presenter: **Frank Hinoporos, CTA** Hall & Wilcox Lawyers
Thursday, 19 May	**Part 4: Trusts and unpaid present entitlements** There will always be an element of Trusts to explore and discuss. In this ever-important area, this session will consider issues and strategies for dealing with UPEs, including: – Why create and avoid UPEs – Sub-trusts and PCG 2017/13 – Will a Section 100A problem arise and can we mitigate the risk? – When might Family Trust Election's be a problem and are there solutions? – Corporate beneficiaries and estate planning – Generation 2 trust splitting and – Angel of death strategy.	**Paul Hockridge, CTA** Hockridge Advisory Tax Update Presenter: **Frank Hinoporos, CTA** Hall & Wilcox Lawyers

Date	Session	Presenter

Thursday, 23 June	**Part 5: "Toto, I've got a feeling we're not in Kansas anymore" - the changing landscape of year-end tax considerations**
	This session will look at the changing landscape of year-end tax considerations while trying to avoid tax landmines. Topics include:
	– Managing Division 7A compliance
	– Distributing trust income
	    – Income definitions
	    – Streaming capital gains and franked dividends
	– Section 100A – say ‘hello’ to the ATO’s little friend
	– Trust losses
	– Closely held trusts and circular trust distributions
	– Professional firm issues
		Neil Brydges, CTA
		Sladen Legal
		Edward Hennebry, FTI
		Sladen Legal
		
		Tax Update Presenter:
		Frank Hinoporos, CTA
		Hall & Wilcox Lawyers

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.

Presenter profiles

Led by tax practitioners for tax professionals

Neil Brydges, CTA, is a Principal Lawyer in Sladen Legal's Tax group. Neil practises in all areas of direct and indirect tax, with a particular focus on the taxation of trusts, corporate tax, M&A and Div 7A. Neil has also advised extensively on cross-border taxation issues. Using his technical tax knowledge, Neil works with clients to obtain commercial and practical outcomes and Neil has particular experience in dealing with the ATO on complex tax issues in a dispute resolution context. Neil is a keen and active member of the tax community. As well as presenting on tax topics at various sessions, he has authored and co-authored several published articles and papers. Neil is an Accredited Specialist in Taxation Law and Chair of the Tax & Revenue Law Committee with the Law Institute of Victoria, a member of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser and member of Dispute Resolution Technical Committee with The Tax Institute

Edward Hennebry, FTI, is a Senior Associate in the Business Law team at Sladen Legal. Edward commenced his career in the ATO's Tax Counsel Network and Review and Dispute Resolution Business Lines. Since leaving the ATO, Edward has worked in a number of large accounting and national law firms, enabling him to diversify his knowledge of prevalent tax and commercial issues that affect private clients and family groups across a wide range of industries.

Frank Hinoporos, CTA, is a Partner and the Practice Leader of the Tax group at Hall & Wilcox. Frank has a particular focus on domestic and international tax for individuals and private groups, including the complex issues tax issues arising from international succession planning, and private philanthropic giving. His clients include SMEs, high net worth individuals, family offices and not-for-profit entities. Frank is a member of the Law Institute of Victoria, a Chartered Tax Adviser with The Tax Institute, a Fellow of the Governance Institute of Australia and a member of the Society of Trust and Estate Practitioners (STEP).

Paul Hockridge, CTA, is the Principal of Hockridge Advisory. He has worked for the ATO, a large law firm, has been a partner in medium and Big 4 chartered accounting firms and has over 30 years' experience in tax, asset protection, estate and succession planning. Paul's niches include litigation support, property development and FBT and salary packaging. Paul specialises in advising high wealth families and closely held businesses, as well as providing support for a number of accounting and law firms. Paul maintains a practicing certificate as a legal practitioner in Victoria, is a fellow of Chartered Accountants Australian and New Zealand, is senior fellow and teaches in the Masters program in the Law School at the University of Melbourne and is a chartered tax adviser. He sits on The Tax Institute's FBT and Employment Taxes Committee and contributes to The Tax Institute's book, Estate and Business Succession Planning. Perhaps Paul is best known as a regular presenter at local, State and National Tax Institute conferences.

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.

William Moore is a Wills, estates and succession planning Partner at Hall & Wilcox Lawyers. He provides regular advice to clients around personal and business succession planning (including preparation of complex Wills and powers of attorney), estate administration, estate disputes, and trust advice (including establishment, ongoing control, variations, resettlements and vesting issues). William has close to 15 years experience and is a member of the Law Institute of Victoria and the Society of Trust and Estate Practitioners.

Simon Tisher, CTA, has been a barrister at the Victorian Bar since May 2003. He is well known and respected as a barrister and within the tax profession. Most of Simon's experience at the Bar pertains to tax matters (state and federal) and matters related to taxation: superannuation, insolvency, bankruptcy and professional indemnity claims (commonly involving tax advice). He acts for taxpayers and for the Australian Taxation Office, led and unled, in disputes ranging from small individual matters to large corporate tax disputes. Simon also has sound experience in commercial litigation matters and has a busy advisory practice. Simon has been included in "Leading Tax Barristers - Victoria" in Doyles Guide every year from 2017 and in Best Lawyers (Tax Law, 2021 and 2022 editions). He is a past Sir Charles Lowe prize winner for advocacy. Simon has published several articles in the *Law Institute Journal* and *Taxation in Australia*, and is the author of the tax chapter of de Groot's *Wills, Probate and Administration Practice (Victoria)*. He is a member and past chair of The Tax Institute's State Taxes Committee. He is a frequent presenter to organisations such as Television Education Network, the Tax Institute and Legalwise Seminars.

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Registration form

42305

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 *(Individual subscription)*	☐ $1600 ($160 per session)	☐ $1,850 ($185 per session)
Individual sessions	☐ $210 x ____	☐ $235 x ____

Please select your session/s below:

- ☐ Part 1 – Thurs, 3 March (42306)
- ☐ Part 2 - Thurs, 24 March (42307)
- ☐ Part 3 – Thurs, 28 April (42308)
- ☐ Part 4 – Thurs, 19 May (42309)
- ☐ Part 5 – Thurs, 23 June (42310)
- ☐ Part 6 – Thurs, 28 July (42311)
- ☐ Part 7 – Thurs, 25 Aug (42312)
- ☐ Part 8 – Thurs, 15 Sep (42313)
- ☐ Part 9 – Thurs, 27 Oct (42314)
- ☐ Part 10 – Thurs, 24 Nov (42315)

Company 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 company subscriptions please contact britneymcilvain@taxinstitute.com.au

Dietary requirements: ....

For event enquiries, please contact Britney McIlvain on 03 9603 2007 or britneymcilvain@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.

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