THE TAX INSTITUTE

Local Tax Club Series – Perth 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.

Register 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.

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.

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 2022
Wednesday, 23 March 2022
Wednesday, 27 April 2022
Wednesday, 25 May 2022
Wednesday, 22 June 2022
Wednesday, 27 July 2022
Wednesday, 24 August 2022
Wednesday, 21 September 2022
Wednesday, 26 October 2022
Wednesday, 23 November 2022

Session details

Time: 7.30 – 9.00am

Venue: HHG Legal Group, Level 8, Cloisters Arcade, Perth

CPD proficiency level:

Proficient

Register now:

taxinstitute.com.au/localtaxclub

For event queries please contact:

@ zoewender@taxinstitute.com.au

+61 08 6165 6602

Proudly supported by:

Sessions

Date	Session	Presenter
Wednesday, 23 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: **Patrick Norman** Birchstone Tax Law
Wednesday, 23 March	**Part 2: Tax implications – Cryptocurrency and Non Fungible Tokens** This session will cover the following: – What is cryptocurrency and what is an NFT? – Is cryptocurrency a currency or foreign currency? – Are cryptocurrency and NFTs CGT assets? – Capital and revenue – Realisation – Forks, other nuances and the ATO's view.	**Adam Dimac** Hall & Wilcox Tax Update Presenter: **Patrick Norman** Birchstone Tax Law
Wednesday, 27 April	**Part 3: Professional firm profits update** On 16 December 2021 the ATO released the finalised Practical Compliance Guideline PCG 2021/4: Allocation of professional firm profits – ATO compliance approach. With a delayed commencement date of 1 July 2022, and transitional arrangements available until 1 July 2024, this will provide tax practitioners time to identify and advise those 'high risk' clients. Join Alex as he examines the professional practices framework, including: – The history of personal services income (PSI), professional firm profits and Everett assignments – A detailed review of Practical Compliance Guidance PCG 2021/4: Allocation of professional firm profits – ATO compliance approach and the latest PSI guidance issued by the ATO – What the PCG does not address and how can advisors navigate those circumstances; and – How structuring can be valuable in complying with PCG 2021/4.	**Alex Sceales, CTA** Sceales Lawyers Tax Update Presenter: **Patrick Norman** Birchstone Tax Law
Wednesday, 25 May	**Part 4: Section 100A - Reimbursement agreements** Section 100A of the ITAA 1936 was introduced in 1979, but it has received little attention outside blatant 'trust stripping' arrangements until recent years. While practitioners have been waiting for the ATO's ruling on section 100A (which is now expected to be released in early 2022), ATO audit activity in this area has been on the increase. This session will cover: – The history of section 100A – The latest ATO guidance – The key requirements for section 100A to apply, including what is an 'ordinary family dealing' – The implications of section 100A applying – Case studies to illustrate the potential application – Practical tips to manage the risk.	**Daniel Taborsky, CTA** Birchstone Tax Law Tax Update Presenter: **Patrick Norman** Birchstone Tax Law

Presenter profiles

Led by tax practitioners for tax professionals

Adam Dimac is an experienced tax lawyer and advises clients on a range of matters including tax planning and structuring, Division 7A, the small business CGT concessions, corporate restructuring, professional firm structures, trust taxation, the taxation of settlements and cryptocurrency taxation. Adam regularly acts for taxpayers in dispute and controversy matters and provides assistance with ATO reviews and audits. His clients include private groups, professional firms, small-to-medium enterprises, high-net-worth individuals and family groups.

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.

Patrick Norman is a tax lawyer at Birchstone Tax law which specialises in tax and succession planning solutions for privately owned enterprises and high net-worth individuals. Patrick holds a Bachelor of Laws and a Bachelor of Commerce (Taxation) and is currently undertaking his CTA studies. His areas of expertise are restructuring and the small business CGT concessions.

Alex Sceales, CTA, is a partner in the firm of Sceales Lawyers. He has over 22 years' experience in providing legal advice about tax and commercial law matters to clients in a wide variety of business and professional sectors. He has a Bachelor of Commerce, and a Master of Laws.

Daniel Taborsky, CTA, is the managing director of Birchstone Tax Law which specialises in tax and succession planning solutions for privately owned enterprises and high-net-worth individuals. Dan has qualifications in both law and accounting. He advises on complex tax and duty matters, resolves disputes with the ATO and State Revenue Offices, advises on trust law issues and assists charities and not-for-profit entities with tax and structuring matters. Dan has been recognised in Doyle's Guide's list of leading tax lawyers for 2020 and 2021.

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

42290 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 – Wed, 23 Feb (42301)
☐ Part 2 – Wed, 23 March (42302)
☐ Part 3 – Wed, 27 April (42335)
☐ Part 4 – Wed, 25 May (42336)
☐ Part 5 – Wed, 22 June (42337)
☐ Part 6 – Wed, 27 July (42338)
☐ Part 7 – Wed, 24 Aug (42339)
☐ Part 8 – Wed, 21 Sep (42340)
☐ Part 9 – Wed, 26 Oct (42341)
☐ Part 10 – Wed, 23 Nov (42342)

Dietary requirements: ……………………………………………………………………………………………………

For event enquiries, please contact Zoe Wender on 08 6165 6602 or zoewender@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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