

Emerging Leaders Program – Sydney

9 CPD hours (1 CPD hours per technical discussion session and 3 CPD hours for leadership seminar)

A unique opportunity to advance your career as an authentic and effective leader. Make connections that count and turn your ambitions into actionable plans for the future.

Propel your professional development to the next level. The Emerging Leaders program is designed for younger practitioners, from progressive graduates to aspiring managers to develop the technical skills, industry contacts and professional savvy to succeed and excel.

The Emerging Leader Program builds and strengthens foundational tax knowledge and career skills suitable for emerging leaders. The program consists of:

- **3 one-hour sessions** of face-to-face technical discussion and networking with local Emerging Leaders
- **2 one-hour sessions** of online technical discussion with local Emerging Leaders
- **1 one-hour session** of online technical discussion with national Emerging Leaders
- **1 three-hour** Leadership Seminar delivered by industry experts

Registration options

- 1 **Full program subscription** – choose to be automatically registered to attend all the sessions so there is no need to fill out the registration form for each session.
- 2 **Individual sessions** – tailor your attendance by simply indicating your preferred session/s on the registration form overleaf.

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 members, delegates and employees is our top priority. Whilst returning to face-to-face events, we continue to actively monitor the situation regarding COVID-19 and follow the latest advice and guidelines issued by the Department of Health, the World Health Organisation and relevant State authorities.

Please note, final implementation of any of these measures is subject to Federal and State Government requirements at the time of each event. To see The Tax Institute's full COVID-19 Event Guidelines, [click here](#).

2022 schedule

Technical Discussion

Wednesday, 13 April

Thursday, 12 May

Thursday, 28 July

Thursday, 11 August

Thursday, 15 September

Time: 5.30 – 7:00pm

Wednesday, 26 October (5:00 – 6:30pm)

Leadership Seminar

Thursday, 24 November

Time: 2.00 – 5:00pm

Venue: CBD Venue & Online

CPD proficiency level:

Developing 

Register now:

taxinstitute.com.au/elprogram

For event queries please contact:

@ mathildevernet
@taxinstitute.com.au

☎ +61 02 8223 0016

Technical program

Date / Time	Topic	Presenter
Wednesday, 13 April	Key Revenue vs Capital Principles	Peter Scott
<i>Online</i>	<p>This practical and interactive session will seek to extract and explore the key principles of revenue vs capital for both income and deductions.</p> <p>Using practical examples, the case study-based discussion will cover:</p> <ul style="list-style-type: none"> – The rules determining whether an asset disposal will be a mere realisation of a capital asset or part of a business or profit-making undertaking, focusing on real property and considering the impact of the 2020 Greig decision. – The capital/revenue rules relating to deductions, including consideration of the 2021 Mussalli decision. 	<p>King & Wood Mallesons</p> <p>Paula Yu</p> <p>King & Wood Mallesons</p>
Thursday, 12 May	International Tax - Corporate Residency	TBC
<i>Sydney CBD</i>	<p>This session will outline the current state of play in relation to corporate tax residency, and provide practical insights into the challenges facing companies today and how those challenges should be managed, including:</p> <ul style="list-style-type: none"> – Tests for determining corporate tax residency – Current ATO guidance and the Board of Tax Review – Why tax residency is critical – Treaty interaction – Governance implications. 	
Thursday, 28 July	Tax Update and Current Topical Issues	Alison Stevenson
<i>Online</i>	<p>This session will deep-dive into need-to-know recent cases, legislation, rulings, private binding rulings, ATO and other materials for tax practitioners.</p> <p>Our presenters will also work through the most topical matters and examples of what they are working through with their clients in your local market in the first part of the year.</p>	<p>Matrix Norwest</p> <p>Lachlan Sue</p> <p>Matrix Norwest</p>



Presenter profiles

Led by tax practitioners for tax professionals

Peter Scott, FTI, is a Senior Associate in the King & Wood Mallesons taxation group. He provides strategic and technical tax advice to Australian and international clients, including listed companies, fund managers, super funds, and private groups. Peter advises across most areas of income tax and GST with a particular focus on corporate and international tax, deals, funds/trusts, and tax controversy matters. Peter is a member of the Tax Institute NSW Emerging Leaders Subcommittee and was a 2019 Tax Institute Awards finalist in the Emerging Tax Star category.

Paula Yu is a Solicitor in the King & Wood Mallesons taxation group. She has worked across a range of tax controversy, corporate tax and stamp duty advisory matters.

Alison Stevenson, CTA, has over 20 years industry experience working in taxation roles, with a primary focus on small business entities and succession planning and has a passion for assisting clients achieve their goals. Alison is the Head of Tax and CFO of Matrix Norwest, an integrated accounting, taxation and financial planning business. Alison leads a team of qualified professionals in delivering excellence through advice, incorporating strategy and compliance. Alison believes in quality, integrated advice underpinned by strong relationships with clients and professional partners. Alison is a CTA of The Tax Institute and is the current Deputy Chair of the NSW State Council. She is the winner of the 2021 Tax Adviser of the Year Award for the Respect – SME: 1-4 Partners Category.

Lachlan Sue, CTA, is a Partner of Matrix Norwest, sitting across both tax and financial planning arms of the business. He has over a decade of experience in the financial services industry, with a primary focus on specialist self-managed superannuation services and small business taxation advice. He is a registered tax agent and Chartered Tax Adviser (CTA) with the Australian Tax Institute, as well as an ASIC approved SMSF auditor who has achieved Specialist Audit Accreditation (SSAud) with the SMSF Association. Lachlan is also an Authorised Representative and a licensed financial planner.

“Joining the Emerging Leaders made me a part of something bigger than myself, my team and my firm. It motivates me to make time for my personal development in a safe environment. I feel comfortable asking questions and have opportunities to learn from other accountants, lawyers and our regulators.”

Kimberley Wheller, ATI
Australian Taxation Office



THE TAX INSTITUTE

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Registration form

42406 | [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 Program subscription	<input type="checkbox"/> \$225 (\$25 per CPD hour)	<input type="checkbox"/> \$315 (\$35 per CPD hour)
Individual sessions	<input type="checkbox"/> \$30 x <input type="text"/>	<input type="checkbox"/> \$45 x <input type="text"/>

Please select your session/s:

<input type="checkbox"/> Thur, 17 Mar 42407	<input type="checkbox"/> Thur, 12 May 42408	<input type="checkbox"/> Thur, 28 Jul 42409	<input type="checkbox"/> Thur, 11 Aug 42410
<input type="checkbox"/> Thur, 15 Sep 42411	<input type="checkbox"/> Wed, 26 Oct 42413	<input type="checkbox"/> Thur, 24 Nov 42413/42414/42415	

Dietary requirements:

For event enquiries, please contact Mathilde Vernet on 02 8223 0016 or mathildevernet@taxinstitute.com.au.

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

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TO REGISTER

➤ Online taxinstitute.com.au

@ Email customeradmin@taxinstitute.com.au

✉ Mail L37, 100 Miller Street, North Sydney NSW 2060

☎ Fax 02 8223 0077