

# Emerging Leaders Program – Melbourne

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

Tuesday, 5 April

**Time:** 6.00 – 7:15pm

Wednesday, 11 May

Wednesday, 27 July

Wednesday, 10 August

Wednesday, 14 September

Wednesday, 26 October

**Time:** 5.30 – 7:00pm

### Leadership Seminar

Wednesday, 23 November

**Time:** 2.00 – 5:00pm

**Venue:** CBD Venue & Online

## CPD proficiency level:

Developing 

## Register now:

[taxinstitute.com.au/elprogram](https://taxinstitute.com.au/elprogram)

For event queries please contact:

@ anniedaryani  
@taxinstitute.com.au

☎ +61 08 8463 9444

# Technical program

Date / Time	Topic	Presenter
<b>Tuesday, 5 April</b>  <i>Deloitte</i> <i>477 Collins St</i> <i>Melbourne</i>	<b>Key Revenue vs Capital Principles</b>  This practical and interactive session will seek to extract and explore the key principles of revenue vs capital for both gains and losses.  Using practical examples, the case study-based discussion will delve into: <ul style="list-style-type: none"> <li>– The grey areas of mere capital realisation versus profit making, undertaking versus “business” in the context of property and similar ventures</li> <li>– Issues of trading stock versus assets held for profit making</li> <li>– Considerations of size of operation and/or taxpayer and whether the type of entity and ownership or business relationships are relevant.</li> </ul>	Christina Leong Deloitte  Julia Pritchard Deloitte
<b>Wednesday, 11 May</b>  <i>CBD Venue</i> <i>Melbourne</i>	<b>International Tax - Corporate Residency</b>  This workshop will provide practical examples of the tax challenges faced by advisers arising from the increased international mobility of their clients, their client’s families, and their client’s businesses.  The case studies will follow the of a local business and their families, and covering key topics such as: <ul style="list-style-type: none"> <li>– The difficulties of determining tax residency of individuals, companies, trusts and SMSFs</li> <li>– The implications of changing tax residency</li> <li>– The operation of dual residency and the “Tie Breaker” provisions in Australia’s tax treaties</li> <li>– Considerations arising from proposed amendments to corporate/individual residency provisions</li> </ul>	Daniel Angelovich PWS Advisory  Ari Gore Jagen
<b>Wednesday, 27 July</b>  <i>Online</i>	<b>Tax Update and Current Topical Issues</b>  This session will deep-dive into need-to-know recent cases, legislation, rulings, private rulings, ATO and other materials for tax practitioners.  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.	Stephanie Pasharis, ATI Allens  Zannie Zaidi Australian Taxation Office

# Presenter profiles

## *Led by tax practitioners for tax professionals*

Daniel Angelovich is Director of the PWS Business Advisory team. Daniel graduated from Deakin University with a Bachelor of Commerce (with distinction) and Law and completed a Masters in Taxation at the University of Melbourne. He is a Chartered Accountant. Whilst specialist taxation consulting and advisory services are Daniel's area of expertise, he works closely with his staff and associates to provide a full financial service offering. By listening to his clients' goals and objectives, Daniel assists his clients by providing solutions which improve their personal and financial well-being, and ultimately achieve greater peace of mind.

Ari Gore is a Chartered Accountant and Solicitor in the Supreme Court of Victoria and is on the High Court of Australia Register of Practitioners.

Ari assists corporates with navigating Australia's complex corporate tax system and laws, with a focus on taxation controversy, corporate and international tax, and stamp duty.

Christina Leong is an Associate at Deloitte Legal. Having worked at Deloitte for 5 years within the tax controversy team, Christina brings an income tax lens to unlock opportunities for and resolve the most pressing problems of Australian-headquartered multinationals.

Stephanie Pasharis, ATI, is an Associate at Allens and is currently completing a Master of Laws at the University of Melbourne. She has advised domestic and international clients on a range of taxation issues such as trust taxation, residency, corporate restructures, share sales, international tax and charity tax concessions.

Julia Pritchard works with some of Australia's largest companies and family groups to resolve their complex taxation issues. Together with her team, she has a particular focus on tax controversy by delivering tax advice and support in response to ATO reviews and dispute resolution matters.

Zannie Zaidi is a Law Interpretation Director in the ATO's Tax Counsel Network where she provides legal advice on complex litigation and technical issues in reviews, audits and objections. Zannie specialises in taxation of trusts disputes, leading priority section 100A cases, taxation of private companies and health wealth groups, administrative law,

settlements and hears cases as a member of the ATO's internal Fraud & Evasion Panel. Zannie has a keen interest and experience in tax policy reform. In the Government's Review of the Tax Practitioners Board, she led the strategic technical design of the ATO's policy reform proposal for implementing new administrative penalties against egregious tax agents and expanding penalty safe harbour provisions (Treasury Discussion Paper 2019). She has qualifications in Law and a background in finance and insolvency law.

*“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

### **COVID-19 Event Guidelines**

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### **Deloitte COVID-19 Guideline**

As part of Deloitte's COVID protocols, you will need to wear masks while inside the building; use the QR Codes when entering the office and again at Level 32.

You will need to be fully vaccinated and be prepared to show your vaccination status on arrival. When you arrive on level 32, reception will ask that you also please check in using the Service Victoria app.



THE TAX INSTITUTE

# Emerging Leaders Program – Melbourne

## Registration form

42354 | [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"/> Tue, 5 Apr 42355	<input type="checkbox"/> Wed, 11 May 42356	<input type="checkbox"/> Wed, 27 Jul 42357	<input type="checkbox"/> Wed, 10 Aug 42358
<input type="checkbox"/> Wed, 14 Sep 42359	<input type="checkbox"/> Wed, 26 Oct 42360	<input type="checkbox"/> Wed, 23 Nov 42361	

Dietary requirements: .....

**For event enquiries, please contact Annie Daryani on 08 8463 9444 or [annidaryani@taxinstitute.com.au](mailto:annidaryani@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](http://taxinstitute.com.au/professional-development/event-policy).

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### TO REGISTER

➤ Online [taxinstitute.com.au](http://taxinstitute.com.au)

@ Email [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

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☎ Fax 02 8223 0077