The Tax Institute

Local Tax Club – Adelaide

22 February – 22 November 2022

Arkaba Hotel, Adelaide CBD

1.5 CPD hour / session

Kick start your CPD this financial year and join your Local Tax Club today!

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 at your Local Tax Club!

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.

For more information about our Refund Policy - COVID-19, click here.

Why should you attend?

This series will provide you with quintessential updates and topical tax content tailored for you and your local tax community.

Schedule

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Registration options

Seven Sessions Subscription

Choose to be automatically registered to attend the reminder 7 monthly Local Tax Club sessions so there is no need to fill out the registration form for each session. If you are unable to attend a session, you may nominate someone else from your firm as your replacement.

Individual sessions

Tailor your attendance by simply indicating your preferred session/s on the registration form.

Technical Program

Date/Time	Session	Presenter
Tuesday 24 May 5.30-7:00pm Arkaba Hotel, 150 Glen Osmond Road, Fullarton	**Part 4: Modern Topics in Cryptocurrency for Tax and Estate Planning** Introductory explanations to blockchains was very 2015. The questions that your clients will ask you in 2022 will involve such things as wrapping cryptocurrencies, staking rewards and liquidity pooling. What answers will you have for them on how they can deal with these transactions for the purposes of tax, trusts and commercial law, and estate planning? Adrian Cartland and Jarod Winders will discuss practical examples with solutions and make suggestions on how various problems can be solved.	**Adrian Cartland**, Cartland Law **Jarod Winders**, Hopscotch Wealth Tax Update Presenter: **Joseph Primerano,** Cartland Law
Tuesday 21 June 5.30-7:00pm Arkaba Hotel, 150 Glen Osmond Road, Fullarton	**Part 5: New ATO guidance on Reimbursement Agreements and Division 7A** Be careful what you wish for - the ATO's long awaited draft guidance on reimbursement agreements under s.100A as well as the use of sub-trusts for managing "financial accommodation" issues under Div. 7A was released earlier this year, but what does this mean for your practice and your clients? Join us for the answers to these questions and much more. This session will also revisit the mechanics of the relevant provisions and explore their key features with helpful examples.	**Tarun Kumar, CTA**, thnk Advisory Tax Update Presenter: **Alexander Noble**, thnk Advisory **Harry Zhang**, thnk Advisory
Tuesday 26 July 5.30-7:00pm Arkaba Hotel, 150 Glen Osmond Road, Fullarton	**Part 6: Tips and Traps for the 2022 Tax Return Season** As we enter a new year of tax return lodgements, what are the changes we need to be alert to when preparing 2022 tax returns, where do the new and old pitfalls lie, and around which corners can we expect the ATO to be waiting? The session will cover: • Details of new-for-2022 changes to items/questions in ITR’s • New thresholds – including the effective tax-free thresholds (i.e. taking into account offsets) for individuals and seniors • Areas of concern highlighted by the ATO as being sources of most common errors • Trusts: Discussion of the recent draft guidance provided by the Commissioner in relation to s 100A • Temporary Full Expensing (TFE), Instant Asset Write Off, Simplified Depreciation Rules and Loss Carry Back: How to ensure you maximise the current tax concessions before they are removed • Dividend imputation issues resulting from loss carry back rules, and strategies to ensure you do not pay franking deficits tax • Likely ITR items identified by ATO for audit action	**Timothy Sandow, CTA**, BDO Tax Update Presenter: **Mark D'Angelica, FTI**, BDO

- Impact of federal government policy post-election
- Key dates for the Tax Agent 2022 Lodgement Program for ITR's as relevant for SME entities.

Tuesday 23 August

5.30-7:00pm

Arkaba Hotel, 150 Glen Osmond Road, Fullarton

Part 7: Tips and Traps of residential property investments

The residential property market has been an exciting and unpredictable landscape over the past few years. Our clients are buying, selling, renting, sub-dividing, downsizing… or at least considering these options! Things are not always as straight forward as they seem, so what are the key issues to be aware of? Come and join us as we explore the tax landscape of owning, selling and developing residential property.

Paul Dimasi, CTA, Nexia Edwards Marshall

George Papanicolaou, Nexia Edwards Marshall

Tax Update Presenter:

Karen Gregor, CTA, Nexia Edwards Marshall

Presenters

Adrian Cartland is a taxation and commercial lawyer and Principal of Cartland Law. He specialises in devising novel solutions to complex trust, equity, partnership and contract law issues and transactions. He is experienced in all the State taxes, particularly stamp duty and land tax, and advises across the full range of Federal taxes.
Adrian is also the Creator of Ailira, the Artificially Intelligent Legal Information Research Assistant, which automates legal research and advice in the areas of tax law, business structuring, estate planning and domestic violence. Adrian is known for his innovative advice and ideas and also for his entertaining and insightful professional speeches.

Mark D'Angelica, CTA, has over 13 years' experience in providing advice on all areas of State and Federal tax, including corporate tax, international tax, tax effect accounting, PRRT, GST, employment taxes, transfer pricing, R&D tax incentive, payroll tax, state royalties and stamp duty. He was the Tax Manager of Beach Energy for 8 years and was key figure in the implementation of new financial reporting systems, mergers and acquisitions, providing strategic tax ad-vice, implementing tax governance framework and liaising with the ATO and AusIndustry.

Paul Dimasi, CTA, is a Business Consulting Services Partner at Nexia Edwards Marshall and current chair of the Property & Construction group for the firm. He has over 15 years' experience in taxation and accounting services to small, medium and large businesses, with considerable experience in the property and construction industry.

Karen Gregor, CTA, is a Specialist Tax Consultant in Nexia Edwards Marshall's Business Consulting and Taxation Divisions. Karen has over 20 years' experience advising clients across many areas and has helped many clients deal with difficult areas of taxation law, including GST and CGT, working with them to find a solution, even when the legislation is ambiguous. She works with clients throughout the life cycle of their business by advising them during its establishment and operation, then, if necessary, working on exit strategies and winding up.

Tarun Kumar, CTA, is a Chartered Accountant and manager at Thnk Advisory with over 11 years of industry experience. Tarun specialises in the SME business space with a tax focus primarily on Division 7A, the CGT Small Business Concessions, Wine Equalisation Tax, and FBT. Tarun advises clients across a diverse range of industries, including primary production, wine, allied health, and crypto currency.

" The monthly updates keep you informed with the latest tax developments whilst the special topics cover the main issues affecting your practice."

Nick Wilkins, CTA, Wilkins Advisory

For event queries please contact Mathilde Vernet:
MathildeVernet@taxinstitute.com.au
+61 02 8223 0016

Register now!

Scan the code to purchase your tickets!

taxinstitute.com.au

Alexander Noble is a senior accountant at Thnk Advisory and a provisional member of CA ANZ. Alex advises clients in building & construction and the primary production industry. Alex is an avid problem solver by nature and a keen tech wiz.

George Papanicolaou has been at Nexia Edwards Marshall since January 2014 and is currently a Senior Manager in Business Consulting. He has over 12 years' experience providing taxation and accounting services to small, medium and large businesses, with considerable experience in the Property & Construction and Wine & Viticulture industries. He is also the South Australian state taxes expert at Nexia Edwards Marshall.

Joseph Primerano, is an Associate Solicitor at Cartland Law specialising in Tax Law. Joseph's key areas of practice include Goods and Services Tax, Division 7A, Business Restructuring, Small Business Entity Concessions and Trusts. Joseph is also a Chartered Accountant with over six years' experience in public accounting, assisting clients with both business and personal tax matters.

Tim Sandow, CTA, is an experienced tax professional with 30 years in the 'Big 4', he provides income tax related advice to a variety of private and large public companies as well as multi-nationals. In particular, Tim has advised many companies on mergers & acquisitions, tax governance, corporate tax, international tax, and employment tax issues, always maintaining a focus on practical commercial advice. One of Tim's key skills is understanding complex tax issues and communicating these in a practical way enabling CFO's, Boards and Business Owners to focus on the key opportunities and risks when making business decisions. Tim is currently the SA representative on National Council of The Tax Institute.

Jarod Winders thinks of himself as a "Fun"-ancial Adviser. As a Master Aerospace Engineer turned Wealth Manager, his passions and skillsets are grounded in understanding people, problem-solving and quick-witted humour. In creating Hopscotch Wealth with his business partner, Jarod has created an outlet to play to all of his strengths and share a few laughs. Hopscotch Wealth helps ambitious professionals, families and businesses take small steps and giant leaps forward in their pursuit of a lifetime of wealth - whatever that means to them!

Harry Zhang is an accountant at Thnk Advisory working in the field of tax and audit. He is a speedcuber and can solve a Rubik's Cube in 15 seconds.

The Tax Institute

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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
Seven sessions subscription	$525	$700
Individual session subscription	$125	$150

Please select your session/s:

- Tue, 24 May 42368
- Tue, 21 Jun 42369
- Tue, 26 Jul 42370
- Tue, 23 Aug 42371
- Tue, 20 Sep 42372
- Tue, 25 Oct 42373
- Tue, 22 Nov 42374

Please note:

Dietary requirements:

Promotional code:

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- up to 50% off membership to 30 June 2023
- member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature: DD/MM/YYYY

2 Delegate contact details

Member no.: **If your member details are up-to-date, you can skip this section.**

Title: Mr Mrs Miss Ms Date of birth: DD/MM/YYYY

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

3 Payment method

Please note: all registration payments must be made prior to the event, unless other arrangements have been made with The Tax Institute.

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

To register **Email** customeradmin@taxinstitute.com.au **Mail** L37, 100 Miller Street North Sydney NSW 2060 **Online** taxinstitute.com.au/localtaxclub