The Tax Institute

Local Tax Club – Parramatta

17 February – 17 November 2022

Spry Roughley Services

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.

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.

Join now and join us for breakfast 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.

Schedule

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Registration options

Individual sessions

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

Six 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.

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.

Technical Program

Date/Time	Session	Presenter
Thursday 23 June 7.30-9:00am AEST Spry Roughly Services	**Part 5: NSW state tax amendments** The NSW Parliament just passed significant changes to state taxation, which are commenced on 20 May 2022. The amendments include: • Expanding the concept of "declaration" of trust to "acknowledgement" of trust, thereby potentially capturing a wider class of transactions. • Expanding the breadth of transfer duty to mere changes in "beneficial ownership". • Expanding the reach of the general anti-avoidance provisions. • Providing a refund of surcharge purchaser duty for Australian-based developers. • Increasing penalty tax for significant global entities (SGEs). • Introducing promoter penalty regime which could affect tax advisers. The amendments comprise significant changes to the risk profile of certain transactions in NSW for taxpayers and advisers alike. Join Steve Paterson, Partner, Grant Thornton, as we explore what the proposed changes could mean for you.	**Steven Paterson, FTI**, Grant Thornton Tax Update Presenter: **Bradley White, Hall & Wilcox**
Thursday 21 July 7.30-9:00am AEST Spry Roughly Services	**Part 6: Managing Super Contributions and benefits in the new financial year** The concepts of total superannuation balance, transfer balance cap and contributions caps have been part of the super jargon for a while. However, clients are still becoming accustomed to the implications when mapping out their superannuation strategies. This session examines the interaction between the use of various contribution strategies to maximise the amount clients can make to super and the importance of contribution sequencing.	**Graeme Colley**, Super Concepts Tax Update Presenter: **Elizabeth Burnheim,** Coleman Greig Lawyers

Thursday 18 August 7.30-9:00am AEST Spry Roughly Services	**Part 7: Professional Firm Profits**	**Vanessa Priest, FTI,** Baskin Clarke Priest Tax Update Presenter: **Todd Bromwich, Hall & Wilcox**

Presenters

Elizabeth Burnheim is a tax lawyer at Coleman Greig Lawyers, specialising in tax, superannuation, estate planning and trust law. Elizabeth draws upon her taxation, superannuation and trust law expertise to provide her clients with in-depth and wholistic estate planning. She has assisted many clients with structuring and shaping their various inter vivos entities and interests (including superannuation) in a manner which is consistent with their estate plan, whilst also achieving optimal taxation outcomes.

Todd Bromwich is a Senior Associate in the Tax group at Hall & Wilcox. His work includes tax planning and structuring for high wealth individuals and family groups, running complex taxation disputes, advising on tax-effective succession planning and estate administration, and establishing and advising not-for-profit entities.

Graeme Colley is the Executive Manager, SMSF Technical and Private Wealth at SuperConcepts. In that role his responsibilities include the provision of technical and education services to private wealth clients, maintaining the company's media and corporate profile and its advocacy with government. Graeme has considerable taxation and superannuation experience gained from senior positions in the ATO, as an Assistant Commissioner of the Insurance and Superannuation Commission, ING as well as leading fund managers and consultants, including Macquarie Bank, Mercer and Chartered Accountants ANZ.

Steven Paterson, FTI, leads Grant Thornton's State Taxes team and has over 20 years experience in advising on state taxes (particularly stamp duty, land tax and foreign surcharges) in every Australian jurisdiction. Over his career, Steven has been involved with numerous major transactions in Australia and gained a working knowledge of some of the most unique and complex business and transaction structuring. He is able to use this knowledge in the ever changing tax and stamp duty landscape.

Vanessa Priest, FTI, of Baskin Clarke Priest has more than 20 years' experience as a tax specialist and has a particular interest in the tax and succession issues faced by privately owned enterprises and family groups. She has extensive knowledge in areas such as tax structuring, cross border issues for individuals and their investments, asset acquisitions and divestments, successions issues, and tax issues arising for trusts.

Bradley White is a Lawyer at Hall & Wilcox. Bradley assists clients with their tax planning, tax controversy and tax structuring needs and has both federal and state tax expertise. Bradley's clients are predominantly small-to-medium businesses and high net-worth family groups, with a focus on the not-for-profit, health, property development and agriculture sectors.

" 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
02 8223 0016

Register now!

Scan the code to purchase your tickets!

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The Tax Institute

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	☐ $510	☐ $660
Individual session subscription	☐ $135	☐ $160

Please select your session/s:

☐ Thur, 23 June 42273
☐ Thur, 21 July 42274
☐ Thur, 18 Aug 42275
☐ Thur, 22 Sep 42276
☐ Thur, 27 Oct 42277
☐ Thur, 17 Nov 42278

Please note:

Dietary requirements:

Promotional code:

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Not a member of The Tax Institute yet? Sign up for membership along with your event registration and save with:

- 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