The Tax Institute

Local Tax Club – Geelong

4 March – 25 November 2022

Rydges, Geelong

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.

Register 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.

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

4 March – 25 November 2022

Rydges, Geelong

1.5 CPD hour / session

Registration options

Six sessions subscription

Choose to be automatically registered to attend the reminder 6 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
Friday 24 June 7.30-9:00am AEST Rydges Geelong	**Part 5: “Toto, I’ve got a feeling we’re not in Kansas anymore” – The changing landscape of year-end tax considerations** Over the last three years, we’ve seen several cases and tax rulings that raise important considerations for SME practitioners. This session will look at the changing landscape of year-end tax considerations while trying to avoid tax landmines. Topics include: • Managing Division 7A compliance • Distributing trust income: Income definitions and streaming capital gains and franked dividends • Section 100A – say “hello” to the ATO’s little friend • Trust losses • Closely held trusts and circular trust distributions • Professional firm issues	**Neil Brydges, CTA**, Sladen Legal **Edward Hennebry, FTI**, Sladen Legal Tax Update Presenter: **Rob Warnock, CTA**, Harwood Andrews
Friday 29 July 7.30–9:00am AEST Rydges Geelong	**Part 6: Challenging of Accounting for Cryptocurrencies** As cryptocurrency becomes more widely adopted, accountants are having to deal with the lack of clarity on taxability of token transactions as well correctly disclosing the capital gain/income when preparing tax returns. The purpose of this session is to discuss the practical accounting issues and challenges of cryptocurrencies, and how to de-risk your practice and clients.	**Rony Choueiri**, Valles Accountants Tax Update Presenter: **Rob Warnock, CTA**, Harwood Andrews
Friday 26 August 7.30–9:00am AEST Rydges Geelong	**Part 7: ATO hot spots** • Professional firms • 100A/Div7A • Capital revenue issues	**Daniel Smith**, ATO Tax Update Presenter: **Rob Warnock, CTA**, Harwood Andrews

Friday 16 September 7.30–9:00am AEST Rydges Geelong	**Part 8: BDBNs post Hill v Zuda** It is anticipated that when this Tax Club is held, the High Court will have handed down their judgement in Hill v Zuda. This is a significant decision that all practitioners working with SMSFs must be aware of! This Tax Club discusses: • what the case is all about • how the case impacts accountants, financial planners, auditors, and lawyers • which traditional practices need to stop IMMEDIATELY • practical steps we all need to start taking NOW to put clients in the best possible positions and • much, much more!	**Bryce Figot, CTA**, DBA Lawyers Tax Update Presenter: **Rob Warnock, CTA**, Harwood Andrews
Friday 28 October 7.30–9:00am AEST Rydges Geelong	**Part 9: TBC**	**Sladen Legal** Tax Update Presenter: **Rob Warnock, CTA**, Harwood Andrews
Friday 25 November 7.30–9:00am AEST Rydges Geelong	**Part 10: TBC**	**Andrew Clements, FTI,** King & Wood Mallesons Tax Update Presenter: **Rob Warnock, CTA**, Harwood Andrews

Presenters

Neil Brydges, CTA, is a Principal Lawyer in Sladen Legal's Tax group. Neil practices in all areas of direct and indirect tax, with a particular focus on the taxation of trusts, corporate tax, M&A and Div7A. Neil has also advised extensively on cross-border taxation issues. Using his technical tax knowledge, Neil works with clients to obtain commercial and practical outcomes and Neil has experience in dealing with the ATO on complex tax issues in a dispute resolution context. Neil is a keen and active member of the tax community. As well as presenting on tax topics at various sessions, he has authored and co-authored several published articles and papers. Neil is an Accredited Specialist in Taxation Law and Chair of the Tax & Revenue Law Committee with the Law Institute of Victoria, a member of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser and member of Dispute Resolution Technical Committee with The Tax Institute.

Edward Hennebry, FTI, is a Senior Associate in the Business Law team at Sladen Legal. Edward commenced his career in the ATO's Tax Counsel Network and Review and Dispute Resolution Business Lines. Since leaving the ATO, Edward has worked in a number of large accounting and national law firms, enabling him to diversify his knowledge of prevalent tax and commercial issues that affect private clients and family groups across a wide range of industries.

Bryce Figot, CTA, is a special counsel at DBA Lawyers and is recognised as one of Australia's leading SMSF lawyers. He has worked predominantly in the fields of tax and superannuation over the past 17 years and holds a Master of Laws from the University of Melbourne. Bryce is a regular seminar presenter on tax and SMSF topics and has published extensively in these areas. Bryce regularly presents for the major professional bodies including the SMSF Association, CPA Australia The Tax Institute, Chartered Accountants Australia and New Zealand and DBA Network. Bryce is regularly quoted and published in the Australian Financial Review, the Herald Sun, CCH, and LexisNexis publications, and elsewhere in the financial press. Bryce wrote the book Complete Guide to SMSFs: Planning for Loss of Capacity and Death, published by CCH Wolters Kluwer. Bryce is on the editorial panel of LexisNexis' Australian Superannuation Law Bulletin. He is a Senior Fellow at the University of Melbourne's Law School, where he is the subject coordinator of Taxation of Superannuation. Bryce is a Specialist SMSF Advisor™.

Andrew Clements, FTI, is a partner in the tax group in the Melbourne office of King & Wood Mallesons. He is a specialist in employee and executive remuneration, with over 30 years' experience. He has extensive experience in both the listed and unlisted environment, having acted for many of Australia's leading public companies in establishing and advising in relation to the tax and corporate issues associated with employee and executive remuneration. That experience also extends to dealing with the complex corporate tax issues associated with providing employee equity in the unlisted environment in Australia. He has worked with many leading Australian and foreign corporations in relation to offering employee benefits throughout Asia. Andrew has experience in dealing with the tax and corporate aspects associated with the restructuring of global equity compensation plans resulting from major corporate transactions.

" 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

Rob Warnock, CTA, is a Principal Lawyer at Harwood Andrews, an innovative law firm with offices in Geelong and Melbourne dedicated to providing expert advice and legal services to their clients. Rob has over 30 years' experience in tax advising. Rob helps accountants, businesses, and individuals on federal and state tax related matters. His areas of practice include trusts, state and federal taxes, tax disputes, business structuring and asset protection.

The Tax Institute

423016 | 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
6 sessions subscription	☐ $510	☐ $660
Individual session subscription	☐ $135	☐ $160

Please select your session/s:

☐ Thurs, 23 June 42321
☐ Thurs, 28 Jul 42322
☐ Thurs, 25 Aug 42324
☐ Thurs, 15 Sep 42324
☐ Thurs, 27 Oct 42325
☐ Thurs, 24 Nov 42326

Please note:

Dietary requirements:

Promotional code:

***Become a member and save!**

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
info.taxinstitute.com.au/membership

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 taxinstitute.com.au/professional-development/event-policy

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