The Tax Institute

Local Tax Club – Perth

February – November 2022

HHG Legal Group, Perth CBD

1.5 CPD hours per 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 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

23 February – 23 November

HHG Legal Group, Perth CBD

1.5 CPD hour per session

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
Wednesday 25 May 7.30-9:00am HHG Legal Group	**Part 4: s100A - Reimbursement agreements** Section 100A of the ITAA 1936 was introduced in 1979, but it has received little attention outside blatant 'trust stripping' arrangements until recent years. While practitioners have been waiting for the ATO's ruling on section 100A (which is now expected to be released in early 2022), ATO audit activity in this area has been on the increase. This session will cover: • The history of section 100A • The latest ATO guidance • The key requirements for section 100A to apply, including what is an 'ordinary family dealing' • The implications of section 100A applying • Case studies to illustrate the potential application • Practical tips to manage the risk.	**Daniel Taborsky, CTA**, Birchstone Tax Law Tax Update Presenter **Patrick Norman**, Birchstone Tax Law
Wednesday 22 June 7.30-9:00am HHG Legal Group	**Part 5: Tips & tricks for the new financial year – what not to forget for next year** This practical session will provide insights on what practitioners can expect in the upcoming financial year, including how to ensure your clients are remaining compliant. Join Billy-Jo as she shares her insights and practical tips on matters that will affect your practice come July. The session will consider: • How the announced budget measures will impact your clients • The superannuation changes occurring from 1 July 2022 • The ATO's compliance approach for the upcoming year • How you, as a practitioner, can assist clients in financial distress • Practice compliance tips and tricks.	**Billy-Jo Famlonga, FTI**, Famlonga Business Services Tax Update Presenter **Rupert Cheong**, Alpha Accountancy
Wednesday 27 July	**Part 6: Professional firm profits update** On 16 December 2021 the ATO released the finalised Practical Compliance Guideline PCG 2021/4: Allocation of professional firm profits – ATO compliance approach. With a delayed commencement date of 1 July 2022, and transitional arrangements available until 1 July 2024, this will provide tax practitioners time to identify and advise	**Alex Sceales, CTA**, Sceales Lawyers Tax Update Presenter

7.30-9:00am HHG Legal Group	those 'high risk' clients. Join Alex as he examines the professional practices framework, including: • The history of personal services income (PSI), professional firm profits and Everett assignments • A detailed review of Practical Compliance Guidance PCG 2021/4: Allocation of professional firm profits – ATO compliance approach and the latest PSI guidance issued by the ATO • What the PCG does not address and how can advisors navigate those circumstances and • How structuring can be valuable in complying with PCG 2021/4.	**Rupert Cheong**, Alpha Accountancy
Wednesday 24 August 7.30-9:00am HHG Legal Group	**Part 7: Tax awareness on small scale property development** Part 7: Tax awareness on small scale property development With the property market running hot nationally, there have been a significant uptake in the number of property development undertakings. This session aims to raise awareness of the tax matters associated with particularly small scale or first-time property developers.	**Daniel Pegdon, CTA**, Moore Australia Tax Update Presenter **Rupert Cheong**, Alpha Accountancy
Wednesday 21 September 7.30-9:00am HHG Legal Group	**Part 8: Payroll tax – Grouping issues** The payroll tax grouping provisions are complex. Very often, businesses are unaware of the triggers and, therefore, when the grouping provisions may apply. This may lead to over-claiming of payroll tax thresholds or, in some cases, not registering for payroll tax obligations in the first place. Assessments of liability for six years plus penalties mean that the implications for getting it wrong are severe. However, in certain circumstances, there is a discretion available to the Commissioner to exclude an applicant employer from a group, where the applicant employer satisfies the Commissioner of certain matters. Using case studies, this session will explore: • The payroll tax grouping provisions • Practical insights in relation to application of these provisions • The circumstances in which the exclusion discretion may be considered and • The impact of the numerous court and tribunal decisions that have tested these provisions.	**Tony Ince, CTA,** Moore Australia Tax Update Presenter **Tracey Dunn**, RSM Australia

Wednesday **26 October** 7.30-9:00am HHG Legal Group	**Part 9: Financial Agreements – Things you may not know** Financial Agreements are often regarded as complex and difficult instruments by lawyers, accountants, and other professionals. Many family lawyers refuse to prepare them. Recently there appears to be a change in thinking as there is a generational shift in asset redistribution. In this presentation/session we hope to inform you of the value of financial agreements.	**Dr Steven Cohen**, HHG Legal Group Tax Update Presenter **Tracey Dunn**, RSM Australia
Wednesday **23 November** 7.30-9:00am HHG Legal Group	**Part 10: Topic to be announced**	Speaker to be announced Tax Update Presenter **Tracey Dunn**, RSM Australia

Presenters

Rupert Cheong, CTA, was a Corpus Christi student before graduating with a Bachelor of Commerce, Accounting and Business Law, with honours in business Taxation. He also completed the Master of Taxation at Curtin University with a high distinction average. Rupert has an extensive accounting background of over 20 years, assisting his clients in a variety of practices including Deloitte, Moore Stephens and Grant Thornton Australia. He owns and operates Alpha Accountancy Services, providing income tax and business services advice to businesses and high net wealth individuals.

Dr Steven Cohen is the Managing Associate for our Family Law team. Dr Cohen's practice encompasses a broad range of matters including children matters, financial matters, child support matters, spousal support applications and relocation cases. Dr Cohen has a particular interest in complex spousal maintenance applications and is also an Independent Children's Lawyer.

Tracey Dunn is as associate director in the Tax Services division of RSM in Perth. Tracey has a Bachelor of Business (Accounting), a Graduate Certificate in Commercial Law and a Bachelor of Laws. Tracey has worked in public practice for over 20 years. Prior to commencing a career in public practice, Tracey worked in commerce in various roles, including banking, logistics management and international trade. Tracey's expertise lies in providing both simple and complex tax advice to high net worth individuals, small and medium-sized businesses with multiple structures, and corporate entities. She has significant experience in advising on the application of FBT, Div 7A and trusts. Tracey regularly presents on taxation topics. Tracey writes extensively on the interpretation of tax legislation for businesses, and has been published in a number of publications, including the Australian Financial Review, ABC News, Accountants Daily, Public Accountant magazine and Thompson Reuters' Weekly Tax Bulletin.

Billy-Jo Famlonga, FTI, is the founder and Principal of Famlonga Business Services located in Malaga. With over 13 years' experience advising Australian businesses, her practice focuses on taxation compliance, business restructuring, tax planning, business succession and providing a comprehensive suite of services to the SME market. Billy advises clients across a diverse range of industries, including primary production, beauty, crypto currency, transport and the NDIS sector.
Billy holds a Graduate Diploma of Applied Tax Law and is a Fellow Member of the Tax Institute and the Institute of Public Accountants. Billy has been a member for over 7 years and sits on The Tax Institute's WA Engagement Committee, Women in Tax Committee and Emerging Leaders Committee

Tony Ince, CTA, has more than 30 years' experience in indirect tax matters. He has been involved in the GST since its inception in Australia and was the spokesperson for CPA WA during implementation. It is his practical approach to tax issues acquired over his career that become the hallmark of his

"The topics presented, as well as the Tax Update papers are an informative and handy reference."

Local Tax Club Past Delegate

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consulting approach to indirect tax issues. Tony also practices in the area of Fuel Tax Credits and state taxes, such as payroll tax and land tax. In this capacity, he has presented on indirect tax topics at numerous state and national events, including CPA Congress and Taxation Institute State Taxes Conferences. With extensive commercial experience with a wide range of clients, he can bring a practical approach to any indirect issue.

Patrick Norman is a tax lawyer at Birchstone Tax law which specialises in tax and succession planning solutions for privately owned enterprises and high net-worth individuals. Patrick holds a Bachelor of Laws and a Bachelor of Commerce (Taxation) and is currently undertaking his CTA studies. His areas of expertise are restructuring and the small business CGT concessions.

Alex Sceales, CTA, is a partner in the firm of Sceales Lawyers. He has over 22 years' experience in providing legal advice about tax and commercial law matters to clients in a wide variety of business and professional sectors. He has a Bachelor of Commerce, and a Master of Laws.

Daniel Taborsky, CTA, is the managing director of Birchstone Tax Law which specialises in tax and succession planning solutions for privately owned enterprises and high-net-worth individuals. Dan has qualifications in both law and accounting. He advises on complex tax and duty matters, resolves disputes with the ATO and State Revenue Offices, advises on trust law issues and assists charities and not-for-profit entities with tax and structuring matters. Dan has been recognised in Doyle's Guide's list of leading tax lawyers for 2020 and 2021.

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:

☐ Wed, 25 May 42336	☐ Wed, 22 Jun 42337	☐ Wed, 27 Jul 42338	☐ Wed, 24 Aug 42339
☐ Wed, 21 Sep 42340	☐ Wed, 26 Oct 42341	☐ Wed, 23 Nov 42342	

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

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