Emerging Leaders Program – Melbourne

5 April – 23 September 2022

In Person

1 CPD hour / session

A unique opportunity to advance your career as an authentic and affective leader!

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 Leaders Program builds and strengthens foundational tax knowledge and career skills suitable for emerging leaders. The program consists of:

- 5 sessions of face-to-face technical discussion and networking with your local community.
- 1 three-hours seminar delivered by industry experts.

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.

Who should attend?

Propel your professional development to the next level. Excellent opportunity to connect with peers within the tax community. Gain technical insights and practical understanding on key issues in tax. Develop and broaden your professional skills by sharing views amongst your networks.

Schedule

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In Person

1 CPD hour / session

Registration options

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.

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

Technical Program

Date/Time	Session	Presenter
Thursday 21 July 5.30-7:00pm AEST Allens, Melbourne	**Part 3: Tax Update and Current Topical Issues** 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
Thursday 15 September 5.30–7:00pm AEST Hall & Wilcox, Melbourne	**Part 4: Back to basics – Blockchain, Cryptocurrency and Non Fungible Tokens (NFTs)** From forking, to scaling, to proof of work… the buzzwords of the new tech frontier are seemingly continuing to increase and become more relevant for our workplaces and clients. In this session, we will bring together a beginner's guide to blockchain, cryptocurrency, and NFTs and a Tax 101 to equip advisers with the basic understanding and terms you need to know. This session will cover: • What is a 'blockchain'? • What is cryptocurrency and what is an NFT? • Is cryptocurrency a currency or foreign currency for tax purposes? • Are cryptocurrency and NFTs CGT assets? • Does the personal use asset exemption? • When are cryptocurrency and NFTs realised for tax purposes? • Are these taxation concepts new?	**Adam Dimac**, Hall & Wilcox **John Bassilios**, Hall & Wilcox
Thursday 27 October 5.30–7:00pm AEST Melbourne CBD	**Part 5: Intergenerational Wealth Transfer** This is a session designed to provide attendees with guidance in assisting clients who have queries about their personal succession planning. Some of the topics covered include: • Discretionary testamentary trusts. • Advances of funds to children and grandchildren by way of gift or loan. • International assets. • Corporate appointors. • Understanding existing structures e.g. inter vivos trusts and superannuation funds. • Strategies in the event of a relationship breakdown. • Gift, loan and mortgage arrangements.	**Will Monotti**, Sladen Legal

Thursday 24 November

2.00–5:00pm AEST
Melbourne CBD

Part 6: The client, the accountant, the lawyer and the ATO

Facilitator:

Panel:

Leadership Seminar delivered by industry experts.

Presenters

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.

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.

Will Monotti is a Senior Associate in Sladen Legal's business law practice group, where he works primarily on administration of estates, personal succession, and estate planning. He has experience in assisting clients with complex and technical estate planning, and provides clear, logical advice which is tailored to client needs and easy to understand. Will was admitted to practice in March 2015. He holds both a Bachelor of Arts and Juris Doctor from Melbourne University.

Adam Dimac is an experienced tax lawyer and advises clients on a range of matters including tax planning and structuring, Division 7A, the small business CGT concessions, corporate restructuring, professional firm structures, trust taxation, the taxation of settlements and cryptocurrency taxation. Adam regularly acts for taxpayers in dispute and controversy matters and provides assistance with ATO reviews and audits. His clients include private groups, professional firms, small-to-medium enterprises, high-net-worth individuals, and family groups.

John Bassilios has broad experience in financial services, funds management, blockchain, corporate and commercial law, with a particular emphasis on funds management related matters. John has acted for a wide range of financial services providers (both start-ups and established industry providers), including retail and wholesale fund managers, investment advisers, financial planners, stockbrokers, IDPS operators, managed discretionary account providers and consumer credit providers. More recently John has taken a keen interest in Blockchain related matters and gained significant experience advising on, and establishing, cryptocurrency funds, reviewing Whitepapers for Initial Coin Offerings (ICO) and advising on the establishment of cryptocurrency exchanges including preparing AML/CTF Programs and terms of use and advising on conducting Security Token Offerings (STOs) in Australia. John is currently a mentor for the RMIT Blockchain Strategy Course.

> "Joining the Emerging Leaders Program 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."

Kimberley Wheller, ATI, Australia Taxation Office

For event queries please contact Mathilde Vernet:

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+61 02 8223 0016

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
Full Program subscription	☐ $125	☐ $175
Individual session subscription	☐ $30	☐ $45
Leadership Seminar Subscription	☐ $90	☐ $135

Please select your session/s:

☐ Thurs, 21 Jul 42357
☐ Thurs, 14 Sep 42359
☐ Thurs, 27 Oct 42360
☐ Thurs, 24 Nov – Leadership Seminar 42361

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 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

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