The Tax Institute

Tax in Practice Workshop: Discretionary Trust

27 July 2022

Deloitte, Launceston

1.5 CPD hours

Don’t miss out on this important engagement session!

Why should you attend?

Join us for this workshop as we delve into the hot topics affecting the tax practitioner today. This event includes a technical session and a networking session to meet your local tax community.

Key Take Aways:

- Engage, connect, and share views with your local tax community and peers.
- Keep up to date and mitigate the risks within this hot topic in tax.
- Hear key insights and practical takeaways from experts in tax.

Schedule

27 July 2022

3:15–6:00pm

Deloitte, Launceston

1.5 CPD hour

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.

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

Program

Date/Time	Session	Presenter
Wednesday 27 July 3:15–3:30pm AEST Deloitte Private, Launceston	**Registration**	
3:30–5:00pm AEST Deloitte Private, Launceston	**Technical session: Discretionary Trust Deed Amendments** Amending discretionary trust deeds to facilitate changes in law, commercial transactions, succession planning, or tax planning can be quite complex and may be ineffective or incur inadvertent income tax or duty consequences. This session will explore the trust, income tax and duty law principles to be considered when amending discretionary trust deeds to facilitate common commercial, succession and taxation transactions including: • changes of trustee investment powers required by financiers. • changes of trustee and appointors for succession planning. • varying the vesting date for succession planning. • the exclusion of beneficiaries on relationship breakdown and for FIDS (Tas) and FILTS (Tas); • differential streaming of trust income tax attributes to beneficiaries for tax planning; and • disclaiming adverse income tax distributions	**Ronald Jorgensen, CTA**, Thomson Geer Lawyers Facilitated by **Kate Alcorso, FTI**, Archer Bushby
5:00–6:00pm AEST Deloitte Private, Launceston	**Networking session**	

Presenters

Ronald Jorgensen, CTA
Tax Partner at Thomson Geer Lawyers, Melbourne. Ron has been conferred a Bachelor of Arts-Laws and Master of Laws. He is admitted in Tasmania, Victoria and to the Federal Court and High Court of Australia. Ron principally consults on Commonwealth and State tax laws, tax dispute resolution and compliance enforcement. Ron specialises in trusts and trust disputes, succession and asset protection, business and investment structuring and tax sensitive commercial and property transactions.

Ron is an Accredited Specialist Tax Law and member of the Tax Law Advisory Committee with the Law Institute of Victoria. He is a member of the Property and Commercial Law Committee of the Law Society of Tasmania. Ron is a Chartered Tax Advisor and member and former chair of the States Taxes Committee (Vic) of The Tax Institute. Ron was recognised by Doyle's Guide Leading Tax Lawyer – Victoria for 2015 to 2021 and Best Lawyers for tax law – Australia 2021 and Global 2021.

Kate Alcorso, FTI
Kate is a Senior Associate Lawyer with Archer Bushby, practising in commercial and estate law, with a particular focus on business transactions and advice on wills and estate matters. Kate has degrees in commerce and law, is admitted to the bar in Tasmania and is a graduate of the Australian Institute of Company Directors.

Kate is the Chair of the Tasmanian State Council of The Tax Institute, the Chair of Girl Guides Australia, and the Deputy Chair of Independent Living Centre Tasmania. Kate has also been involved with other Tasmanian not for profit boards and has filled roles within governance, risk, and strategic advisory committees for several organisations. Kate rounds out her involvement in the local community by volunteering as a Girl Guide leader.

For event queries please contact Mathilde Vernet:

MathildeVernet@taxinstitute.com.au
+61 02 8223 0016

Register now!

Scan the code to purchase your tickets!

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
Individual session subscription	☐ $60	☐ $80

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/events