THE TAX INSTITUTE

Local Tax Club Series – Gold Coast

6 CPD hours (1.5 CPD hours per session)

Keep up to date with the latest developments in all areas of tax.

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 5 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.

Subscribe now and join us at your Local Tax Club!

Registration options

1. **Full Series Subscription** – choose to be automatically registered to attend each of the 5 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.

2. **Individual sessions** – tailor your attendance by simply indicating your preferred session/s on the registration form overleaf.

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.

At The Tax Institute, the health and wellbeing of our employees, members and delegates is our top priority. To read more information on our COVID-19 event guidelines and cancellation policy, please click here.

2022 schedule

Wednesday 18 May
Wednesday 27 July
Tuesday 27 September
Tuesday 22 November

Session details

Time: 7:30 – 9:00am

Venue: Oakes Gold Coast
2801 Gold Coast Hwy
Surfers Paradise QLD 4217

CPD proficiency level:

Proficient

Register now:

taxinstitute.com.au/localtaxclub

For event queries please contact:

@ mathildevernet
@taxinstitute.com.au

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Sessions

Date	Session	Presenter
Tuesday 7 June	Part 2: 30 June – Key matters to consider before year end - This is not your "standard" year-end planning session! In this not to be missed session, our experts will highlight and delve into some of the bigger issues to be thought about by SME practitioners and their clients. Key topics and takeaways to be covered include: – Section 100A – what to do practically about the ATO guidance – Division 7A – particularly the ATO's new approach to UPEs – Professional Firms Profit – when should we be concerned – Key budget announcements, including what wasn't announced	Mark Molesworth, CTA BDO Tax Update presenter: TBC
Wednesday 27 July	Part 3: Dealing with difficult structures – preparing for the future. When assisting clients on how to plan, one usually begins with the end in mind, which incorporates focus on the "planned end" like a trade sale or family transfer while maintaining flexibility for the unplanned. Care needs to be taken when doing the groundwork to ensure that clients can maintain and realise value both now and in the future. As well as addressing most of the income tax rollovers and concessions that are useful to help restructure value, this session will also consider: – Intellectual property, social media, and ownership. – Managing valuation issues involving complex structures considering cases, affiliates and connected entities. – Whether Subdiv 328-G helps in these situations? – Buyer versus seller considerations.	Linda Tapiolas, CTA Cooper Grace Ward Tax Update presenter: TBC
Tuesday 27 September	Part 4: Personal Services Income Rules – not a case of set and forget These rules have been with us for a long time now but there is still plenty to beware of. This session will discuss tips and traps when dealing with clients deriving income from personal services.	John Ioannou, CTA Macpherson Kelly Alan Gill, CTA Lutz & Associates
Tuesday 22 November	Part 5: Crypto and NFT Assets Crypto in Business Existing guidance for crypto has focused primarily on its use for investment. However, crypto is now increasingly being used in everyday business activities. In a business setting, crypto is used as payment for goods and services, employee remuneration, trading stock and many others. Let's consider the most popular crypto transactions seen in business and the corresponding accounting and tax treatment.	Maryna Kovalenko, CTA, Kova Tax

Presenter profiles

Led by tax practitioners for tax professionals

Jodie Robinson, CTA is a Special Counsel with McCullough Robertson Lawyers with over 19 years of experience working with SME clients and their advisers, assisting them to navigate the challenges that arrive in the lifecycle of a business. As a CTA and Accredited Specialist in Taxation Law, Jodie is passionate about providing clients with results-driven, commercial advice and solutions for their taxation and business needs. Her core practice areas focus on providing advice on taxation matters including duty, GST and capital gains tax and advising clients on business structures and restructures. Jodie is currently a member of The Tax Institute Queensland State Council and the Revenue Law Committee of Queensland Law Society. Jodie was also recognised by Doyle's Guide Recommended Tax Lawyer.\

Linda Tapiolas, CTA is a Partner in the Cooper Grace Ward Lawyers Commercial team. She provides a range of support services to accountants, financial planners, and other professional advisers. This includes technical advice on complex tax, CGT and Div 7A issues, as well as acting on business sales and acquisitions to ensure clients achieve commercial and tax-effective outcomes. Prior to joining Cooper Grace Ward, Linda worked as an accountant for 18 years advising clients on capital gains, business acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions.

Mark Molesworth, CTA is a tax partner at BDO and a member of The Tax Institute's SME Technical Subcommittee and the Queensland State Technical Committee. He is also a member of the expert advisory panel to the Board of Taxation. Mark has many years of experience in advising taxpayers with respect to all areas of taxation, including CGT, FBT and income tax. He also provides taxation advice to other smaller accounting and legal practices in respect of their clients.

John Ioannou, CTA was admitted as a Solicitor in 2002, is a Principal Lawyer at Macpherson Kelley and leads the national tax practice. He has experience in the areas of tax structuring, tax disputes and commercial transactions. John has a Bachelor of Arts, Bachelor of Laws and a Masters of Law.

Maryna Kovalenko, the Tax Co-Founder @ Kova Tax, is a Chartered Tax Adviser and the member of the Institute of Public Accountants with extensive experience in accounting, audit, and tax.
Equipped with a passion for cryptocurrency and she has specialised in crypto tax over the last four years.
Maryna empowers Kova Tax to be Australia's tech-driven accounting firm, building a better digital world for investors, businesses, and SMSFs in the cryptocurrency sector. With her latest venture, Syla, She is now solving crypto tax for investors and professionals through software and automation. She is inspiring more professionals to make the leap into the blockchain world.

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Registration form

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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 series (5 sessions)	☐ $300 ($75 per session)	☐ $400 ($100 per session)
Individual sessions	☐ $125 x ☐	☐ $150 x ☐

Please select your session/s below:

☐ Part 1 - Wed, 18 May (42419) ☐ Part 2 – Wed, 27 Jul (42420)

☐ Part 3 – Tue, 27 Sep (42421) ☐ Part 4 – Thu, 22 Nov (42422)

Dietary requirements: ……………………………………………………………………………………

For event enquiries, please contact Mathilde Vernet on 02 8223 0016 or mathildevernet@taxinstitute.com.au.
1.5 CPD hours allocated for each session. CPD hours will be allocated to the designated attendee.

2 Delegate contact details

If your member details are up-to-date, you can skip this section

Member no.: ____________________

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms

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 purposes.

3 Payment method

☐ 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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