

Local Tax Club Series – Townsville

7.5 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

Tuesday 22 March
Tuesday 24 May
Wednesday 27 July
Tuesday 27 September
Tuesday 22 November

Session details

Time: 7:30 – 9:00am

Venue: Findex

Level 5, 22 Walker Street
Townsville QLD 4810

CPD proficiency level:

Proficient



Register now:

taxinstitute.com.au/localtaxclub

For event queries please contact:

@ mathildevernet
@taxinstitute.com.au

☎ +61 02 8223 0016

Sessions

Date	Session	Presenter
<i>Tuesday 22 March</i>	Part 1: In Our Sights This informative session will provide insights into the tax policy and administration matters currently in the sights of the Tax Policy and Advocacy team at The Tax Institute. Join our Senior Advocate, Robyn Jacobson, CTA, as she shares her insights and practical tips on matters that affect your clients. The session will include a discussion on the following key matters: <ul style="list-style-type: none"> – Looking ahead to the Federal Budget 2022–23 and the Federal election – Tax reform: update on Case for Change – Recent submissions and advocacy work – Key pending ATO guidance and consultation 	Robyn Jacobson, CTA The Tax Institute Tax Update presenter: David Hall, CTA Findex
<i>Tuesday 24 May</i>	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: <ul style="list-style-type: none"> – 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 	David Hall, CTA Tax Update Presenter: Scott Vollmerhause
<i>Wednesday 27 July</i>	Part 3: 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 Tax Update presenter: Scott Vollmerhause
<i>Tuesday 27 September</i>	Part 4: Topic to be announced TBD	
<i>Tuesday 22 November</i>	Part 5: Topic to be announced TBD	



Presenter profiles

Led by tax practitioners for tax professionals

David Hall, CTA, is an Associate Partner of Findex Townsville where he heads up its NQ Tax Advisory Team. David & his team provide Tax Advisory services both to Findex clients in North Queensland and throughout the group and other accounting and law firm clients David has over 32 years' experience in a wide range of areas but has particular focus on small business taxation, providing advice and support in the areas of Division 7A, trusts, small business CGT concessions, restructures, succession & estate planning, sale of businesses and assets. David holds a Master of Taxation from the University of New South Wales, a Bachelor of Commerce from James Cook University, is a FCPA, Tax Agent and a Chartered Tax Adviser.

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She has nearly three decades in the profession, including a public practice background that preceded her various training roles over 23 years. Robyn continues to be a regular conference and webinar presenter and is an avid advocate, social media commentator, columnist, blogger and podcaster. She is also regularly quoted in the media.

Robyn is a Chartered Tax Adviser of The Tax Institute, a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. She regularly consults with the Treasury, ATO and professional bodies on technical issues including as a member of the ATO's Tax Practitioner Stewardship Group and various other working groups.

Robyn has been recognised as a Thought Leader for the third consecutive year as Winner of this category at the Women In Finance Awards in 2019 and 2021, and at the Australian Accounting Awards in 2020. Robyn was the Winner of the Accountants Daily Excellence Award in 2020 and was named in the global Top 50 Women in Accounting 2019.

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 Master of Law.

Refund Policy – COVID-19

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

If a registered delegate is unable to attend as a result of a diagnosis of COVID-19 or they are experiencing symptoms of COVID-19, a full refund will be offered with the provision that a medical certificate is produced explaining the diagnosis or a summary of the appropriate action to be taken i.e. a COVID-19 test and medical advice.

If a registered delegate is unable to attend a face-to-face event as a result of interstate border closures or they reside in or visited a COVID-19 hotspot, we will endeavour to transition the registration to an online registration for the event. If there is a difference in price a credit will be provided to delegates to be used at a future event. If a delegate does not wish to transition their registration to the alternate online event, a full refund/credit will be provided.

Refund Policy – General

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee. The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.



THE TAX INSTITUTE

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Registration form

42439 | 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
Full series (5 sessions)	<input type="checkbox"/> \$375 (\$75 per session)	<input type="checkbox"/> \$500 (\$100 per session)
Individual sessions	<input type="checkbox"/> \$125 x <input type="text"/>	<input type="checkbox"/> \$150 x <input type="text"/>
Please select your session/s below:		
<input type="checkbox"/> Part 1 – Tue, 22 Mar (42440)	<input type="checkbox"/> Part 2 – Tue, 24 May (42441)	<input type="checkbox"/> Part 3 – Wed, 27 Jul (42442)
<input type="checkbox"/> Part 4 – Tue, 27 Sep (42443)	<input type="checkbox"/> Part 5 – Tue, 22 Nov (42444)	

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: Cardholder's signature:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

TO REGISTER

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