

# Local Tax Club Series – Toowoomba

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 17 May

Thursday 28 July

Tuesday 14 September

Tuesday 22 November

## Session details

Time: 7:30 – 9:00am

Venue: Power Tynan  
Suite 6, 618 Ruthven St  
Toowoomba, QLD 4350

## CPD proficiency level:

Proficient 

## Register now:

[taxinstitute.com.au/localtaxclub](https://taxinstitute.com.au/localtaxclub)

For event queries please contact:

@ mathildevernet  
@taxinstitute.com.au

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# Sessions

Date	Session	Presenter
<i>Tuesday 22 March</i>	<p>Part 1: In Our Sights</p> <p>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.</p> <p>The session will include a discussion on the following key matters:</p> <ul style="list-style-type: none"> <li>– Looking ahead to the Federal Budget 2022–23 and the Federal election</li> <li>– Tax reform: update on Case for Change</li> <li>– Recent submissions and advocacy work</li> <li>– Key pending ATO guidance and consultation</li> </ul>	<p>Robyn Jacobson, CTA</p> <p>The Tax Institute</p> <p>Tax Update presenter: Tom Delany</p>
<i>Tuesday 17 May</i>	<p>Part 2: 30 June – Key matters to consider before year - This is not your “standard” year-end planning session!</p> <p>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.</p> <p>Key topics and takeaways to be covered include:</p> <ul style="list-style-type: none"> <li>– Section 100A – what to do practically about the ATO guidance</li> <li>– Division 7A – particularly the ATO’s new approach to UPEs</li> <li>– Professional Firms Profit – when should we be concerned</li> <li>– Key budget announcements, including what wasn’t announced</li> </ul>	<p>Mark Molesworth, CTA</p> <p>BDO</p> <p>Tax Update presenter: TBC</p>
<i>Thursday 28 July</i>	<p>Part 3: Dealing with difficult structures – preparing for the future.</p> <p>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:</p> <ul style="list-style-type: none"> <li>– Intellectual property, social media, and ownership.</li> <li>– Managing valuation issues involving complex structures considering cases, affiliates and connected entities.</li> <li>– Whether Subdiv 328-G helps in these situations?</li> <li>– Buyer versus seller considerations.</li> </ul>	<p>Linda Tapiolas, CTA</p> <p>Cooper Grace Ward</p> <p>Tax Update presenter: TBC</p>
<i>Wednesday 14 September</i>	<p>Part 4: Crypto and NFT Assets</p> <p>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.</p>	<p>Maryna Kovalenko, CTA, Kova Tax</p>
<i>Tuesday 22 November</i>	<p>Part 5: Personal Services Income Rules – not a case of set and forget</p> <p>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.</p>	<p>John Ioannou, CTA</p> <p>Macpherson Kelly</p> <p>Alan Gill, CTA</p> <p>Lutz &amp; Associates</p>



# Presenter profiles

## *Led by tax practitioners for tax professionals*

**Tom Delany**, CTA is the principal of Tax Partner Pty Ltd, which provides tax training, and tax consultancy services to accounting and legal firms including a wide range of tax advisory services such as high-level tax planning in addition to preparing tax advice, private ruling requests, and objections on a variety of tax related topics. Tom holds a Master of Taxation from the University of New South Wales, a Bachelor of Business (with Distinction) from the University of Southern Queensland, is a FCPA, FIPA, Chartered Accountant, 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 which 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 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. Robyn was recognised in the Women In Finance Awards 2019 as the Winner of Thought Leader of the Year and was named in the global Top 50 Women in Accounting 2019. She was recognised in the Australian Accounting Awards 2020 as the Winner of both Thought Leader of the Year and the Accountants Daily Excellence Award.

**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.

**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.

**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.





THE TAX INSTITUTE

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## Registration form

42423 | 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 (42424)	<input type="checkbox"/> Part 2 – Tue, 17 May (42425)	<input type="checkbox"/> Part 3 – Thu, 28 Jul (42426)
<input type="checkbox"/> Part 4 – Tue, 27 Sep (42427)	<input type="checkbox"/> Part 5 – Tue, 22 Nov (42428)	

Dietary requirements: .....

For event enquiries, please contact Mathilde Vernet on 02 8223 0016 or [mathildevernet@taxinstitute.com.au](mailto: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:	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms	
First name:	<input type="text"/>	Last name: <input type="text"/>
Position:	<input type="text"/>	Company: <input type="text"/>
Address:	<input type="text"/>	
Suburb:	<input type="text"/>	State: <input type="text"/> Postcode: <input type="text"/>
Telephone:	<input type="text"/>	Mobile: <input type="text"/>
Email:	<input type="text"/>	

☐ 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

<input type="checkbox"/> Cheque payable to The Tax Institute (in Australian dollars)	
<input type="checkbox"/> Credit card \$ <input type="text"/>	Card type: <input type="checkbox"/> AMEX <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Diners
Name on card:	<input type="text"/>
Card no.: <input type="text"/>	Expiry date: <input type="text"/> Cardholder's signature: <input type="text"/>

For our refund, cancellation and replacement policy visit [taxinstitute.com.au/professional-development/event-policy](http://taxinstitute.com.au/professional-development/event-policy).

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### TO REGISTER

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