

Local Tax Club Gold Coast

Breakfast Club Series

28 September – 1 December 2023

KPMG, Gold Coast

1.5 CPD hour / session



There's never been a better time to join your Local Tax Club!

With a local and topical line-up of sessions and presenters, the Local Tax Club Series delivers quintessential and hot topics which affect you and your clients.

Each session features 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.

Join us for breakfast at your Local Tax Club!

Terms and conditions: 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 2023 only. Please see the registration page for registration options. For more information about our Refund Policy [click here](#).

Who should attend?

This series will provide you with quintessential updates and topical tax content tailored for you and your local tax community.

Schedule

28 September – 1 December

KPMG, Gold Coast

1.5 CPD hour / session

Registration options

Company subscription

Pre-purchase session credits to be spread across your firm throughout the year at a discounted price. Each month nominate the names of the delegates you wish to register, and we take care of the rest. You can top up your session credits at any time.

Full Series

Register for the full series and receive an event reminder and materials ahead of 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 28 September 7:30-9:00am AEST KPMG Corporate Ctr One, Corporate Ct, Bundall	Part 3: What's Up Doc? - Payroll Tax and medical professionals - amnesties, exemptions and grouping Following the outcome of recent cases, rulings and the announcement of potential exemptions and amnesties, payroll tax for medical practitioners is currently a very pertinent tax issue for a legal/accounting practice with medical clients. This session will cover the current state of play in this area, what practices are affected and practical considerations for clients. Despite the recent focus on contractors and billing practices, it is also important to remember that payroll tax grouping remains an ongoing issue and this session will also look at common grouping issues in medical practices.	Speaker: Alan Gill, CTA, Lutz & Associates
Thursday 19 October 7:30-9:00am AEST KPMG Corporate Ctr One, Corporate Ct, Bundall	Part 4: What are the hot tax issues coming across your desk?	Speaker: Jodie Robinson, CTA, McCullough Robertson
Friday 1 December 7:30-9:00am AEST KPMG Corporate Ctr One, Corporate Ct, Bundall	Part 5: Passing the baton (not the tax issues) Many private and family-owned businesses will transition to next generation ownership or be sold in the next few years. Effective succession planning is a complex process that raises many potentially difficult issues, including tax. While the plan may not trigger immediate tax consequences, a well-thought out plan should assist in avoiding any unintended consequences when the plan is implemented. This session will highlight: <ul style="list-style-type: none">• Change of control – now vs later, and how will the successor obtain control. The availability of tax concessions, impact on pre-CGT assets, availability of tax losses• Consideration for the transfer – market value substitution rules, CGT value-shifting, buy-sell agreements, use of insurance to fund a buy-out, funding issues (ie Div7A, debt forgiveness)• Restructures to facilitate transfer of assets or operations, including share-buy backs, dividend stripping• Other strategies to facilitate the plan, including use of option agreements, lease or licence of business assets.	Speaker: Michelle Hartman, CTA, PwC

Presenters

Alan Gill, CTA, is the Senior Taxation Manager at Lutz & Associates, where he has practised as an accounting and taxation adviser for over 15 years. He obtained a Master of Taxation from the University of New South Wales in 2008 and has also taught taxation subjects to undergraduate and post graduate students at Griffith University. His main focus is providing specialist taxation services to larger SME clients, but also consults to legal and accounting practices on specialist taxation matters.

Michelle Hartman, CTA, is a Tax & Advisory Partner at PwC Private with many years of experience in providing practical tax advice to clients. Michelle advises private clients across a broad range of issues and taxes, including structuring for acquisitions and divestments. She specialises in assisting private clients (and the families behind them) plan for transition of both ownership and leadership, appreciating that it can be an emotionally challenging time.

Jodie Robinson, CTA, is an Accredited Tax Law Specialist and Special Counsel in the tax team with McCullough Robertson Lawyers. Jodie is passionate about providing clients with results-driven, commercial advice and solutions for their taxation and business needs. Jodie regularly advises on the tax consequences of the sale of significant businesses, business restructures, including applicable rollovers and duty exemptions, and holding company interpositions. Jodie also assists clients and their advisors in obtaining private binding rulings and dealing with payroll tax self-review audits.

“The Local Tax Club provides you with the opportunity to network with your colleague whilst maintaining your technical knowledge.”

Nick Wilkins, CTA, Wilkins Advisory

**For event queries please contact
Events Team:**

qld@taxinstitute.com.au

Register now!



**Scan the code to
purchase your tickets!**

taxinstitute.com.au

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
Company subscription (3 credits)	<input type="checkbox"/> \$225	<input type="checkbox"/> \$300
Full Series (3 sessions)	<input type="checkbox"/> \$225	<input type="checkbox"/> \$300
Individual session	<input type="checkbox"/> \$125	<input type="checkbox"/> \$150

Please select your session/s:

Thu 28 Sep 43153
 Thu 19 Oct 43155
 Fri 1 Dec 43157

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 2024 member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at taxinstitute.com.au/membership
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:

JOIN TODAY

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:

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:

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

Email customeradmin@taxinstitute.com.au

Mail L37, 100 Miller Street North Sydney NSW 2060

Online taxinstitute.com.au/events