Local Tax Club Geelong

Breakfast Club Series

23 June – 24 November 2023

Geelong Events Centre

1.5 CPD hour / session

Be part of our Breakfast Clubs in Victoria – join today!

With a local and topical line-up of sessions and presenters, the Local Tax Club Series Long regarded as the must-attend monthly event in Victoria, our Breakfast Club Series feature a local and topical line-up of sessions and presenters who are experts in their fields. Included for all attendees is a monthly tax update to keep you abreast of Australia's ever changing tax legislation.

Being part of these events 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.

Special offer: Buy 5 get 1 free! As we head into the new financial year, take advantage of our buy 5 get 1 free offer, available for company or individual subscriptions, meaning you can attend the remainder of the series at a discounted rate.

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

23 June – 24 November 2023

Geelong Events Centre

1.5 CPD hour / session

Registration options

Company subscription – *buy 5 get 1 free!*

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

Full series – *buy 5 get 1 free!*

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
Friday **23 June** 7.30-9:00am AEST Geelong Events Centre Cnr Gheringhap and Little Myers St	**Part 5: 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: • Unpacking the key measures from the Federal Budget 2023–24 • Recent submissions and advocacy work • Recent and expected ATO guidance; and • How recent guidance and legislative measures impact you and your clients.	**Speaker:** Robyn Jacobson, CTA, Senior Advocate, The Tax Institute **Tax update presenter:** Robert Warnock, CTA, Harwood Andrews
Friday **28 July** 7.30-9:00am AEST Geelong Events Centre Cnr Gheringhap and Little Myers St	**Part 6: The scope of Section 99B and implications for Australian beneficiaries** More millionaires have migrated to Australia in the last 20 years than (almost) any other country in the world. This is in addition to returning expats, inheritors and beneficiaries of overseas wealthy families. It is shocking for these clients to learn that half of their funds could be wiped out by Australian tax. The application of section 99B is often met with disbelief by clients. It has the potential to capture amounts which a lay-person might otherwise consider to be tax-free. Despite having been introduced over 40 years ago, its interpretation and scope is not always fully understood. In today's environment, it can apply to common situations, such as: • Previous foreign employment earnings • Pre-migration wealth • Foreign gifts and inheritance; and • Inter-generational wealth transfers. This session will explore the scope of section 99B and useful strategies to manage the implications for Australian resident high net wealth individuals and wealthy families. This includes accounting treatment, record keeping and other practical and technical considerations.	**Speaker:** George Psarrakos, CTA, Mutual Trust **Tax update presenter:** Robert Warnock, CTA, Harwood Andrews

Friday **25 August** 7.30-9:00am AEST Geelong Events Centre Cnr Gheringhap and Little Myers St	**Part 7: Tax Agent Obligations & Issues Confirmed** Tax Agents can be placed in difficult situations with clients on a daily basis. The Code of Professional Conduct regulates the conduct of all registered tax agents, and yet, too often, issues arise where ethical and legal obligations are routinely ignored to satisfy the demands of clients. In this presentation, Arthur Athanasiou will revisit the regulatory and ethical framework that applies to registered tax agents under the Tax Agent Services Act 2009. The Code of Professional Conduct will be analysed with practical examples and guidance on how to avoid the intervention of the TPB.	**Speaker:** Arthur Athanasiou, CTA Life, Thomson Geer Lawyers **Tax update presenter:** Robert Warnock, CTA, Harwood Andrews
Friday **22 September** 7.30-9:00am AEST Geelong Events Centre Cnr Gheringhap and Little Myers St	**Part 8: Digital Assets Update** This session will present updates in respect of the tax treatment of digital assets (e.g. crypto and non-fungible token (NFT)) including: • The Board of Taxation Review of the Tax Treatment of Digital Assets and Transactions in Australia • Tax consequences arising from the FTX collapse • New and interesting tax issues in blockchain; and • Recent updates to the ATO's website guidance.	**Speaker:** Edward Moore, Victorian Bar **Tax update presenter:** Robert Warnock, CTA, Harwood Andrews
Friday **27 October** 7.30-9:00am AEDT Geelong Events Centre Cnr Gheringhap and Little Myers St	**Part 9: ATO Next 5000 Program Property Related Issues** The ATO's Next 5,000 program is in its fifth year. Although this program focusses on Australia's wealthiest private groups and is not industry specific, in the findings released by the ATO it has identified property related tax issues are common in this population. In this session, the ATO will discuss the following: • An overview of the Private Wealth programs and how our property and construction strategy is incorporated. • A recap of the Next 5,000 program, including our targeted approach with key focus areas (which include property and construction issues) • How our Next 5,000 program incorporates our property and construction strategy and the insights we have seen from engagements to date.	**Speaker:** Louise Clarke, Australian Taxation Office **Tax update presenter:** Robert Warnock, CTA, Harwood Andrews
Friday **24 November** 7.30-9:00am AEDT Geelong Events Centre Cnr Gheringhap and Little Myers St	**Part 10: Recent 100A developments and what they mean in practice** There have recently been a number of notable section 100A developments. In December 2022, the ATO issued the new taxation ruling TR 2022/4 and practical compliance guideline PCG 2022/2. Meanwhile, a series of cases have progressed through the courts, including the Guardian AIT and BBlood Enterprises cases. In this session, Mark will consider these recent developments, and their practical implications.	**Speaker:** Frank Hinoporos, Hall & Wilcox Lawyers **Tax update presenter:** Robert Warnock, CTA, Harwood Andrews

Presenters

Arthur Athanasiou, CTA Life, is a partner at Thomson Geer. Arthur's main area of practice is dispute resolution, particularly in the SME sector, with the ATO, TPB and the SRO. Arthur has many years' experience in complex tax audit, negotiations, settlements and tax litigation. He also has broad experience in the taxation of SME entities, with an emphasis on Division 7A and high wealth individuals and family groups. Arthur is an associate professor at La Trobe University Law School. He has qualified as a Chartered Accountant, is a former President of The Tax Institute, chaired the Law Institute's Tax Law Advisory Committee and now serves on the Industry Advisory Board of the IPA-Deakin University SME Research Centre.

Louise Clarke commenced her role as Deputy Commissioner, Private Wealth in August 2021, and currently leads Private Wealth's Client Experience stream. Louise was previously the ATO's Deputy Commissioner for Policy, Analysis and Legislation. During the near three-years in the role, Louise led the ATO's contribution to the legislative design and implementation of the Australian Government's COVID-19 measures, including JobKeeper. Louise has spent an extensive period of her ATO career working in the Tax Counsel Network, with her law design experience spanning across multiple initiatives within the agency and beyond. She spent five years leading ATO strategic litigation and ran significant cases in the Federal and High Courts, including Chevron, RCF IV and RCI. She was seconded to Treasury for a two-year period as a member of the Ralph Review Secretariat, and more recently worked closely with Treasury in developing redrafted transfer pricing law following the Commissioner's loss in SNF. She led the ATO's contribution on several legislative Board of Tax reviews and worked on the design and implementation of a raft of new measures including Division 7A and the alienation of personal services income rules.

Frank Hinoporos, CTA is a Partner in the Tax group at Hall & Wilcox. Frank has a particular focus on domestic and international tax for individuals and private groups, including the complex issues tax issues arising from international succession planning. His clients include SMEs, high net worth individuals and families and not-for-profit entities. Frank is a member of the Law Institute of Victoria, a Chartered Tax Adviser with The Tax Institute, a Fellow of the Governance Institute of Australia and a member of the Society of Trust and Estate Practitioners (STEP).

Robyn Jacobson, CTA, Senior Advocate, The Tax Institute. Robyn has 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 Co-Chair of the ATO's Tax Practitioner Stewardship Group and a member of various other working groups. Robyn has been recognised as a Thought Leader five times over four consecutive years as Winner of this category at the Women In Finance

"Attending the Breakfast Club in Geelong and discussing current tax issues is a must for me. It's not just about earning CPD points, but also about fostering meaningful connections within the Geelong and regional Victorian tax community. I encourage all local tax professionals to come along."

Laura Spencer, ATI, KHQ Lawyers

For event queries please contact the Events Team: VIC@taxinstitute.com.au

Awards in 2019, 2021 and 2022, and at the Australian Accounting Awards in 2020 and 2022. Robyn was the Winner of the Accountants Daily Excellence Award in 2020 and was named in the global Top 50 Women in Accounting 2019.

Edward Moore is a tax expert with nine years' experience in the public and private sectors. He also accepts briefs in commercial and administrative law matters. Prior to joining the Bar, Edward was a senior manager at PwC, where he focussed on cross-border mergers and acquisitions and international tax issues. He previously spent two years at Greenwoods and Herbert Smith Freehills, advising large Australian companies in the financial services and real estate industries, and advising high net worth individuals. Edward started his career working for the ATO on rulings, audits, settlement negotiations and legislative design and spent a year at Treasury working on the taxation of superannuation and other retirement income policies.

George Psarrakos, CTA, is a tax partner at Mutual Trust, Australia's largest multi-family office. He advises both domestic and international wealthy families, businesses and private clients on the tax and commercial implications of their strategic, operational and investment decisions. This includes advising on complex tax issues, managing ATO audits, transaction support for significant business milestones and life-changing events. He specialises in effective strategies for protecting and transferring wealth across borders and across family generations.

Robert Warnock, CTA is a Principal Lawyer at Harwood Andrews, Victoria's largest firm with a head office based in a regional centre. Rob has over 30 years' experience in tax advising. Rob helps accountants, businesses and individuals on matters with his areas of practice including trusts, state and federal taxes, tax disputes, business structuring and asset protection.

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
Company Subscription (6 credits) Buy 5 get 1 free offer	~~$1050~~ $875	~~$1110~~ $925
Full Series (6 sessions) Buy 5 get 1 free offer	~~$1050~~ $875	~~$1110~~ $925
Individual Session	$210	$235

Please select your session/s:

- Fri 23 June 43185
- Fri 28 July 43187
- Fri 25 Aug 43188
- Fri 22 Sept 43189
- Fri 27 Oct 43190
- Fri 24 Nov 43192

Dietary requirements:

Promotional code:

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- access member-only prices to this and future events
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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.

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