

Local Tax Club Perth

Breakfast Club Series

28 June – 29 November 2023

HHG Legal Group, Perth

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.

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

28 June – 29 November 2023

HHG Legal Group, Perth

1.5 CPD hour / session

Registration options

Company subscription - buy 5 get 1 free!

Pre-purchase session credits to be shared 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 - buy 5 get 1 free!

Register for the remainder of the series and receive 6 sessions for the price of 5. Delegates will 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
Wednesday 28 June 7.30-9:00am AWST HHG Legal Group Level 8/863 Hay St Perth	Part 5: SBCGT Concessions - Why you need to get it right for your clients? This session will cover a high-level overview on the following: <ul style="list-style-type: none"> • Basic conditions to meet eligibility • Concessions Available • Active Asset Test • 15-year exemption; and • Case study. 	Speaker: Sammy Syed, RSM Australia Tax Update presenter: Nicole Fleay , RSM Australia
Wednesday 2 August 7.30-9:00am AWST HHG Legal Group Level 8/863 Hay St, Perth	Part 6: Superannuation Update This session will cover a general superannuation update, including recent changes to: <ul style="list-style-type: none"> • Contributions • Pensions; and • Considerations for preparing financial statements for 2022/2023. 	Speaker: Christie Butler, CTA, Cooper Partners Tax Update presenter: Dudley Elliot, CTA, Trove Advisory
Wednesday 30 August 7.30-9:00am AWST HHG Legal Group Level 8/863 Hay St, Perth	Part 7: Restructuring using CGT Rollovers This session will provide an overview of the most common restructure rollovers contained in Divisions 122-A, 124-M, 328-G and 615, including a discussion on the following: <ul style="list-style-type: none"> • Rollovers and tax consolidation • Concerns with back-to-back rollovers • CGT rollovers and transfer duty issues. 	Speaker: Gaurav Chitnis, CTA, HLB Mann Judd Tax Update presenter: Speaker to be announced

**Wednesday
27 September**

7.30-9:00am AWST
HHG Legal Group
Level 8/863 Hay St
Perth

Part 8: Insolvency

Session information coming soon.

Speaker:

John Carrello, BRI Ferrier

Tax Update presenter:

Speaker to be announced

**Wednesday
1 November**

7.30-9:00am AWST
HHG Legal Group
Level 8/863 Hay St
Perth

Part 9: 101 things you wish you knew about family law

Dr Steven Cohen will present a snapshot of tax issues in family law matters, including when a family lawyer is likely to call for specialist tax advice and intersections for tax specialists to watch out for.

Speaker:

Dr Steve Cohen, HHG Legal Group

Tax Update presenter:

Speaker to be announced

**Wednesday
29 November**

7.30-9:00am AWST
HHG Legal Group
Level 8/863 Hay St
Perth

Part 10: Session information coming soon.

Session information coming soon.

Speaker:

Speaker to be announced

Tax Update presenter:

Ross Heard, Smailes Krawitz

Presenters

Christie Butler, CTA is a senior manager with Cooper Partners Financial Services. Initially working in both tax and super, Christie has specialised in SMSFs over the last 20 years in both superannuation compliance and advice. She has a keen interest in assisting SMSF's with rectifying compliance issues, estate planning and divorce.

John Carrello has been a registered Liquidator since 1994, a Trustee in Bankruptcy since 2018, he is a principal at BRI Ferrier WA and has had a breadth of experience in all facets of insolvency, he has undertaken files that have returned 100 cents in the dollar to creditors, assisted Directors in managing company debts as well as being involved in Litigation based recoveries, utilising all the legislative tools available.

Gaurav Chitnis Gaurav is a Tax Consulting Partner at HLB Mann Judd. He is a CPA, Chartered Tax Advisor and a lawyer admitted to the Supreme Court. Gaurav has over 17 years of experience as a tax advisor in the SME space and specialises in CGT, Division 7A, business restructures, taxation of trusts and tax residency. Gaurav's clients are predominantly other accountants who require specialist tax advice and assistance with rulings, objections and managing ATO audits for their clients.

Gaurav is a regular presenter at various tax forums and is also a guest lecturer at Curtin University.

Dr Steven Cohen is the Managing Associate for our Family Law team. Dr Cohen's practice encompasses a broad range of matters including children matters, financial matters, child support matters, spousal support applications and relocation cases. Dr Cohen has a particular interest in complex child related matters and spousal maintenance applications and is an Independent Children's Lawyer.

Dudley Elliot, CTA is a Director with Trove Advisory Group. He has over 30 years' experience in advising businesses on taxation issues, structuring, financing and exit strategies. Dudley commenced his career in the early 1980's in banking, before moving into public accounting in 1988 firstly with BDO and then later with Deloitte where he became a partner in 1999. In 2007, Dudley left Deloitte to establish his own practice advising clients and other practices.

Nicole Fleay, has over 8 years' experience in dealing with large ASX and dual listed clients nationally and internationally, as well as large corporate and family-owned private companies.

Nicole's experience has spanned small, medium, and large corporate stand-alone companies and corporate groups within the mining, property development, services, manufacturing and technology industries. A broad corporate base has resulted in Nicole playing an active role in providing clients with practical and cost-effective solutions to complicated tax situations.

Ross Heard is an Adviser at Smailes Krawitz. Ross provides commercially grounded tax advice to his clients with a focus on corporate transactions and rollovers, CGT, employee share schemes and succession planning. Ross has a Bachelor of Commerce from the University of Western Australia, is a Chartered Accountant and is currently completing his Juris Doctor at the University of Western

“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:

wa@taxinstitute.com.au

Register now!



Scan the code to
purchase your tickets!



taxinstitute.com.au

Australia, with a view to being admitted as a lawyer.

Sammy Syed is a Senior Manager in the Perth Tax Service division. Sammy has a broad spectrum of business and tax knowledge, focusing on all aspects of his client's affairs, including exposure to business structure review, Capital Gain Tax including Small Business CGT Concessions. He works with and services clients primarily in the small-medium enterprise space.

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	<input type="checkbox"/> \$450 <input type="checkbox"/> \$375	<input type="checkbox"/> \$600 <input type="checkbox"/> \$500
Full Series (6 sessions) Buy 5 get 1 free offer	<input type="checkbox"/> \$450 <input type="checkbox"/> \$375	<input type="checkbox"/> \$600 <input type="checkbox"/> \$500
Individual Session	<input type="checkbox"/> \$125	<input type="checkbox"/> \$150

Please select your session/s:

<input type="checkbox"/> Wed, 28 June 43174	<input type="checkbox"/> Wed, 2 Aug 43175	<input type="checkbox"/> Wed, 30 Aug 43176
<input type="checkbox"/> Wed, 27 Sept 43177	<input type="checkbox"/> Wed, 1 Nov 43178	<input type="checkbox"/> Wed, 29 Nov 43180

Dietary requirements:

Promotional code:

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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.

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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:

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:

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To register

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Mail L37, 100 Miller Street North Sydney NSW 2060

Online taxinstitute.com.au/events