The Tax Institute

Local Tax Club Adelaide

Supper Club Series

26 September – 28 November 2023

In-person

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 supper 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

26 September – 28 November

Majestic Roof Garden Hotel

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
Tuesday 26 September 5.30-7:00pm ACST Majestic Roof Garden Hotel 55 Frome St, Adelaide	**Part 4: Understanding how to make Division 7A loan repayments using a journal entry** Division 7A has been with us for more than 25 years, yet it continues to be one of the most challenging aspects of tax law for SME practitioners. Due to popular demand following the delivery of this presentation at the Barossa Convention 2023, using practical examples, this encore session will discuss: • Recap on the policy intent of Division 7A • What practically changes following the ATO's revised position on the tax treatment of unpaid present entitlements (TD 2022/11)? • Are your clients making effective minimum yearly repayments? – Direct set-off against a dividend – Round-robin set-off against a dividend using journal entries • Consequences of failing to make effective minimum yearly repayments • What happens when you take on a new client and discover debit loans have not been treated correctly?	**Speaker:** Robyn Jacobson, CTA, The Tax Institute **Tax Update Presenter:** Nick Wilkins, CTA, Wilkins Advisory
Tuesday 28 November 5.30-7:00pm ACST Majestic Roof Garden Hotel 55 Frome St, Adelaide	**Part 5: Administration of deceased estates – Trips and traps** The session will cover practical tips and traps in applying for probate and letters of administration with a particular focus on disclosure of assets and liabilities and common tax themes, such as: • Key requirements for applications for probate and letters of administration • Disclosure requirements for assets and liabilities, in particular: – Land – Superannuation interests – Shares in private companies – Loan accounts / UPEs – Assets held as trustee – Interests in deceased estates	**Speaker:** Brian Paris, Wallmans Lawyers and Jessica Stimson, ATI, Wallmans Lawyers **Tax Update Presenter:** Jessica Stimson, ATI, Wallmans Lawyers

- Subsequent disclosure of inaccurately described or additional assets
- Registrar's Certificates
- Tax considerations for deceased estates
  - Concessional tax treatment
  - Superannuation
  - Main residence
  - Testamentary trusts
- Pre-CGT assets

Presenters

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She 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 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.

Brian Paris is a special counsel at Wallmans Lawyers. Brian's practice includes the provision of advice concerning wills and the administration of deceased estates, including obtaining Grants of Probate and Letters of Administration both in South Australia and overseas. Brian works closely with Wallmans' Tax practice and Estate Litigation practice. Brian assists clients and families manage and resolve estate disputes, including issues concerning Powers of Attorney, Advance Care Directives and raising challenges with the Will or the deceased estate.

In addition to Brian's wills and estate practice, Brian is a highly experienced commercial and property lawyer. Brian prepares and advises on various documents, including business sales and acquisitions, retail leasing (both for landlords and tenants), franchising, due diligence investigations and general contract advice.

Jess Stimson, ATI, is a senior associate practising in Wallmans Lawyers' Taxation and Superannuation team. She provides taxation, superannuation and succession advice to individuals, partnerships, companies, trusts, estates, SMSF trustees, businesses and the corporate sector generally.

Jess is undertaking a Masters of Taxation Law. She has specialised expertise in providing advice on trusts, restructures, transactions, stamp duty, indirect taxes, superannuation and asset protection. Her experience extends to taxation disputes and objections, including pre-audit, audit, objection and appeal phases of matters relating to income tax (including CGT), GST, stamp duty and land tax.

Jess further advises on business structuring, business succession, and drafts various commercial

"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:

sa@taxinstitute.com.au

documents. Additionally, she assists across a broad range of commercial matters, including property and business transactions and commercial regulatory compliance. Jess has a keen interest in wills and the administration of deceased estates, and specifically the intersection between Estate law, Taxation and Superannuation law.

Nick Wilkins, CTA, provides taxation, accounting and business services to clients ranging from individuals to high net wealth family groups.

His areas of speciality include capital gains tax (including the small business CGT concessions), deceased estates and small business entity concessions.

Nick has extensive experience in helping small and medium size businesses maximise their potential and value – through management accounting, budgeting and benchmarking and by attending board and management meetings. His expertise helps clients maximise their return from the small business CGT concession.

Nick is a long-standing contributor to the Australian accounting profession through his involvement with The Tax Institute, both locally and nationally. He was chair of the SA State Council 2021-22 and has served as a member of the National Convention Organising Committee and the SA Organizing Committees.

He has made numerous presentations for The Tax Institute on topics including personal services income, employee/contractors and structure.

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 (2 credits)	☐ $150	☐ $200
Full Series (2 sessions)	☐ $150	☐ $200
Individual session	☐ $125	☐ $150

Please select your session/s:

☐ Tue 26 Sep 43197 ☐ Tue 28 Nov 43198

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

JOIN TODAY

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.

To register **Email** customeradmin@taxinstitute.com.au **Mail** L37, 100 Miller Street North Sydney NSW 2060 **Online** taxinstitute.com.au/events