

Local Tax Club Gold Coast

March – November

KPMG, Gold Coast

1.5 CPD hours / session



Join your Local Tax Club today!

The latest tax knowledge, hot topics and local networking

Being part of your Local Tax Club will keep you on top of the latest tax knowledge, connected with peers in your local tax community and up to date on essential tax hot topics which may impact you and your clients.

Each session features a specialist tax topic presented by a subject matter expert, and a monthly tax update to keep you on top of Australia's ever changing tax legislation.

Our flexible registration options mean you can register for the full series or just select the sessions you wish to attend.

Being part of your Local Tax Club will not keep you on top of the latest tax knowledge connect you with your peers, and fellow members of your tax community.

Register for your Local Tax Club today! Gain valuable resources, stronger connections, and all the latest knowledge in tax.

Who should attend?

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

Schedule

27 March – 20 November

1.5 CPD hour / session

KPMG, Gold Coast

Registration options

Full series

Register for the full series and receive an event reminder and materials ahead of each session.

Company subscription

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

Technical Program

Date/Time	Session	Presenter
Thursday, 27 March 7:30–9:00am AEST KPMG, Level 11, Corporate Centre One, Corner Bundall Road and Slatyer Avenue, Bundall	Part 1: Small business CGT concessions This session will provide an overview of the common mistakes, tips and traps that practitioners often face when advising on the small business CGT concessions. In this session we will explore: <ul style="list-style-type: none"> • Eligibility for active assets (e.g. farms or commercial property used in business originally and then sold after leasing for a long period of time) • CGT concessions for succession and the term ‘in connection with your retirement’ when looking at eligibility; and • Other common pitfalls and where practitioners may get it wrong. 	Jodie Robinson, CTA, McCullough Robertson
Thursday, 8 May 7:30–9:00am AEST KPMG, Level 11, Corporate Centre One, Corner Bundall Road and Slatyer Avenue, Bundall	Part 2: Intergenerational Wealth Transfers and Family Group Disputes As family dynamics evolve and wealth is passed from one generation to the next, the complexities of succession planning and intergenerational wealth transfers grow. This session delves into the complexities of transferring wealth across generations and resolving disputes within family groups. It highlights strategies for ensuring smooth transitions, minimising risks, and fostering long-term stability. Key topics include: <ul style="list-style-type: none"> • Bank of Mum and Dad: Risks of undue influence in financial support arrangements and the importance of clear documentation • Investment Structures: Innovative investment structures, such as companies with trust shareholders, to prepare for generational shifts • Loans and UPEs: Cleaning up loans and unpaid present entitlements (UPEs) in trusts to avoid complication • Testamentary Trusts: Tax and asset protection benefits of testamentary trusts • Wealth Transfers: Using deeds of family arrangement to formalise wealth transfers and document transitions effectively • Division 296 Tax: Navigating Division 296 tax implications, including potential risks of forced asset liquidation; and • Strategies for Managing Family Group Disputes: Encouraging collaborative discussions to resolve tensions, leveraging family structures, addressing the role of advisors in avoiding conflict and maintaining objectivity, addressing increasing scrutiny and challenges faced by trustees from beneficiaries. 	Neal Dallas, CTA, BusinessDEPOT Victoria Mercer, BusinessDEPOT

Thursday, 24 July **Part 3: Family Law and Tax**

7:30–9:00am AEST

KPMG, Level 11, Corporate
Centre One, Corner Bundall
Road and Slatyer Avenue,
Bundall

With client structures becoming increasingly complex it is common for advisers, both legal and accounting, to encounter problems. This session will discuss some of the common issues that practitioners encounter.

Wendy Miller, CTA, Damien
Greer

Thursday, 9 October

7:30–9:30am AEST

KPMG, Level 11, Corporate
Centre One, Corner Bundall
Road and Slatyer Avenue,
Bundall

Part 4: Family Trust Elections – The complexities in making and managing an FTE

The rules about family trust elections, in particular who is part of the ‘family group’ and what are ‘distributions’, are quite complex and commonly misunderstood.

A proper understanding of these rules is critical because distributions outside of the ‘family group’ could result in the family trust distribution tax being triggered.

Family trust distribution tax, if triggered, is a debt that is not subject to a review period and for which the entity (which makes the distribution), together with the individuals who are directors or trustees, can be jointly liable. Therefore, it is important that advisers understand the concepts of ‘family group’ and ‘distributions’.

In this special two-hour session, Linda will cover:

- What are the implications of making a FTE or IEE
- When is a FTE or IEE required
- Requirement to make a valid FTE or IEE (including issues for testamentary trusts in meeting the ‘family control’ test)
- What are ‘distributions’
- Which individuals and entities are part of the ‘family group’
- Who is liable for FTDT
- What should the trust deed say to help with these issues; and
- Passing control of trusts to the next generation

Linda Tapiolas, CTA
Cooper Grace Ward Lawyers

**Thursday, 20
November**

7:30–9:00am AEST
Power Tynan, 6/618
Ruthven St, Toowoomba
City QLD 4350

Part 5: What's coming across your desk?

This interactive session with Jodie and Alan will discuss the latest challenges faced by advisors with the opportunity to ask questions and collaborate with your peers.

Alan Gil, CTA, Lutz & Associates
Jodie Robinson, CTA,
McCullough Robertson

Presenters

Neal Dallas, CTA is the Legal Director at BusinessDEPOT. He has extensive experience advising clients in the areas of superannuation, tax, estate planning and asset protection. He is recognised in the 2025 Edition of Best Lawyers in Australia in the areas of Superannuation Law, Tax Law, Trusts and Estates, and Wealth Management/Succession Planning Practice.

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.

Victoria Mercer is an Associate Lawyer in the Wealth Advisory Division at businessDEPOT (Legal), specialising in complex estate planning, self-managed superannuation, and strategic tax planning. Her practice focuses on serving high net worth individuals, business owners and blended families. Victoria distinguished herself academically by earning the title of Dux in her Advanced Superannuation during her Graduate Diploma of Applied Tax at the Tax Institute in 2023. In 2022, Victoria was nominated as a 'Rising Star' in the Queensland Wills and Estates Law category for the leading industry publication Doyle's Guide and regularly presents at industry conference including the SMSF Association, Legalwise and The Tax Institute. As a trusted advisor, Victoria relishes the opportunity to tackle complex family dynamics and structures, helping families transition their wealth to the next generation.

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.

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.

“ The Local Tax Club is a great opportunity to understand not only the technical issues, but also how other professionals are dealing with the issues both practically and commercially

Michelle Hartman, CTA

For event queries please contact
Harmony Fletcher

harmonyfletcher@taxinstitute.com.au
+61 07 3225 5209

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purchase your
tickets!**

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1 Registration

Please select your registration type:

	Member	New member*	Non-member
Full series registration	<input type="checkbox"/> \$350	<input type="checkbox"/> \$350	<input type="checkbox"/> \$500
Single session registration	<input type="checkbox"/> \$100	<input type="checkbox"/> \$100	<input type="checkbox"/> \$150

Please select your session/s:

<input type="checkbox"/> Thu, 27 March 44238	<input type="checkbox"/> Thu, 8 May 44239	<input type="checkbox"/> Thu, 24 July 44240	<input type="checkbox"/> Thu, 9 Oct 44241	<input type="checkbox"/> Thu, 20 Nov 44242
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Dietary requirements:

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3 Payment method

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☐ **Credit card** Card type: ☐ AMEX ☐ Visa ☐ MasterCard ☐ Diners

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