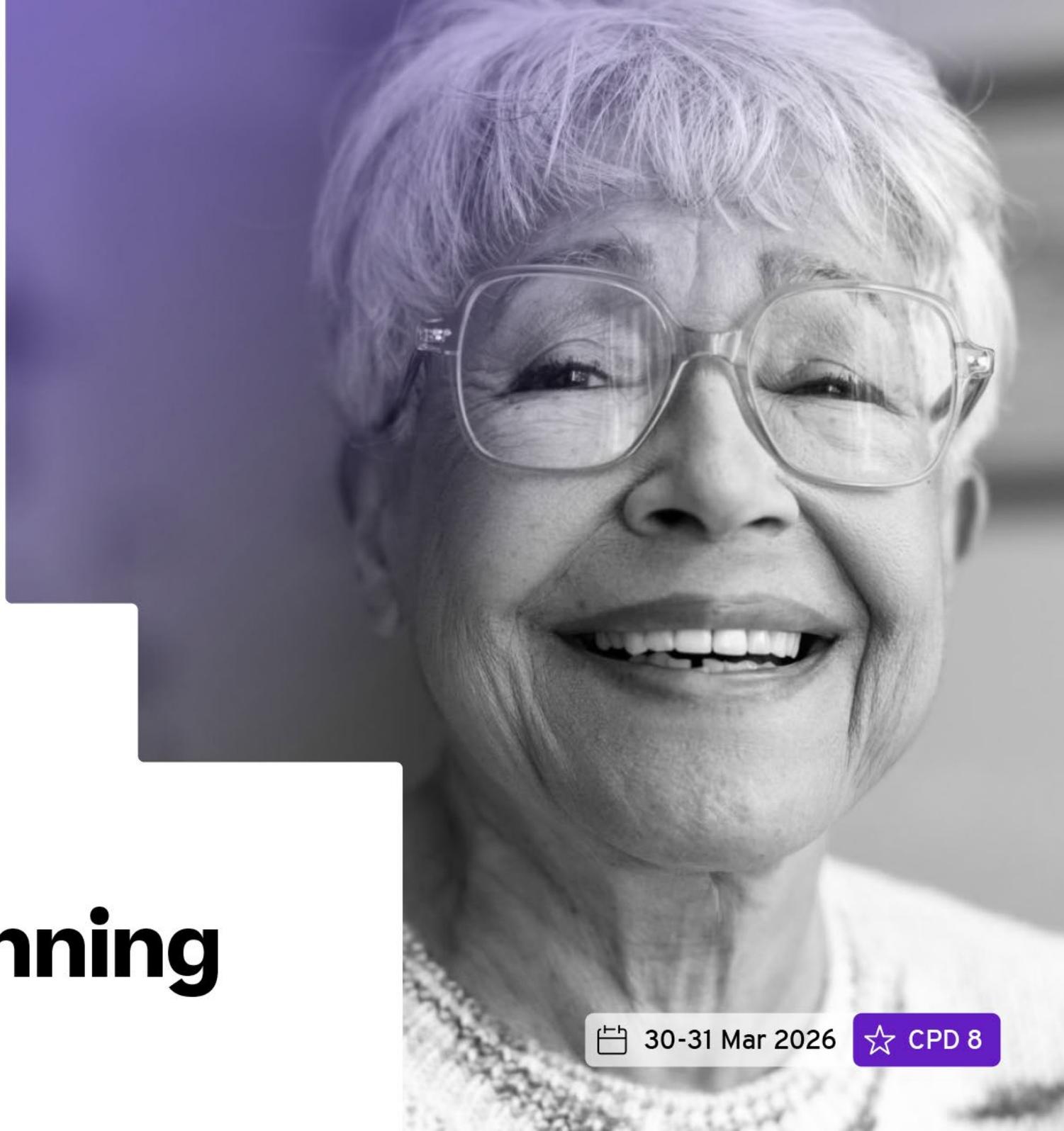


# Estate Planning Intensive

 30-31 Mar 2026

 CPD 8





# Welcome

On behalf of The Tax Institute, we are delighted to invite you to attend the Estate Planning Intensive.

Estate planning continues to be an area of significant complexity and risk for tax professionals, with evolving legislation, heightened ATO scrutiny, and increasingly sophisticated client structures. As trusted advisers, this necessitates staying abreast of the latest developments in our industry and understanding the impacts of these changes on our clients. The Estate Planning Intensive promises to deliver to help you do just that.

Presented online over two days on 30 & 31 March, this Intensive will feature key sessions on a range of current and relevant topics for tax practitioners and advisers working in the areas of deceased estates and post-death tax compliance.

Through expert-led presentations and real-world case studies, this event will explore key tax considerations across wills, trusts, superannuation, and estates, highlighting common pitfalls and planning opportunities.

Attendees will leave with practical strategies they can apply immediately when advising clients, helping to manage risk, optimise outcomes, and add value in an increasingly sensitive and high-stakes area of practice.

We look forward to seeing you online.

**Early bird pricing offer**

**Register on or before 13 March 2026 to save!**

# Technical program

## Day 1 Monday, 30 March 2026

Time *AEDT	Session
10:25-10:30am	Welcome and opening address
10:30-11:30am	<p><b>Session 1: The taxation of deceased estates – Practical realities</b> Speaker: Kimberley Martin, WMM Law</p> <p>This session provides a practical overview of the taxation framework for deceased estates, with a focus on what advisers need to manage in real time. It will cover timing rules, lodgement requirements and the three-year concessionary period, along with common challenges such as cost base adjustments, losses and compliance risks. The session will also highlight frequent errors and key ATO focus areas.</p>
11:30am-12:30pm	<p><b>Session 2: CGT on death – Real-world scenarios and strategic planning</b> Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers</p> <p>A scenario-based session exploring how CGT applies on death and where advisers can add value through strategic planning. Topics include CGT events and cost base resets, navigating the main residence exemption (including partial use and complex fact patterns), and managing capital gains pre- and post-death. The session will also consider timing and structuring strategies for intergenerational transfers.</p>
12:30-1:00pm	Lunch
1:00-2:00pm	<p><b>Session 3: Superannuation and death benefits</b> Speaker: Sam Baring, Hall &amp; Wilcox</p> <p>This session unpacks the tax and practical complexities of superannuation death benefits and the key decisions that shape outcomes for beneficiaries. It will compare reversionary pensions and binding death benefit nominations, and explore tax-effective structuring approaches within estates. The session will also address common SMSF challenges, including control issues, disputes, illiquid assets and trustee succession.</p>
2:00-3:00pm	<p><b>Session 4: Trusts in estate planning – Control, vesting and generational succession</b> Speakers: Daniel Smedley, CTA, Sladen Legal, Kaitilin Lowdon, ATI, Sladen Legal</p> <p>Using case studies, this session will consider the role of trusts in estate planning and the issues that commonly arise when transitioning control across generations. This session will cover passing control of family trusts and related entities, managing vesting dates and tax consequences, and the modern use of testamentary trusts (including excepted income rules and flexibility). It will also highlight hidden risk areas such as Division 7A, unpaid present entitlements and other technical traps.</p>

# Technical program

**Day 2**      Tuesday, 31 March 2026

Time *AEDT	Session
10:30-11:30am	<p><b>Session 5: Family business and small business CGT concessions at death</b> Speaker: Dung Lam, CTA, West Garbett</p> <p>This session focuses on how the small business CGT concessions can be applied in estate planning for family groups and private businesses. It will cover the transfer of active assets, shares and business interests, along with key succession considerations for SMEs and family business structures. The session will also examine the importance of shareholder agreements and governance documents in supporting smooth transitions and managing risk.</p>
11:30am-12:30pm	<p><b>Session 6: Cross-border estate planning – Residency and global tax issues</b> Speaker: Lisa To, CTA, Bartier Perry</p> <p>With increasingly global families and asset holdings, this session explores the cross-border tax issues that can complicate estate planning. It will examine residency-related tax traps, foreign beneficiaries and reporting obligations, and how double tax agreements and foreign death taxes may impact outcomes. The session will also cover practical strategies for advisers supporting globally mobile clients with offshore assets.</p>
12:30-1:00pm	<b>Lunch</b>
1:00-2:00pm	<p><b>Session 7: Emerging issues – Digital assets, crypto and modern wealth</b> Speaker: Tracey Dunn, EY</p> <p>This session explores the critical considerations for managing digital assets in estate planning, from valuation to risk management and will discuss the following:</p> <ul style="list-style-type: none"><li>• Identification, valuation, and transfer of digital assets;</li><li>• Access and control issues for executors;</li><li>• Tax treatment of crypto and tokenised assets on death; and</li><li>• Practical risk management and documentation.</li></ul>
2:00-3:00pm	<p><b>Session 8: Ethics in practice – Elder abuse, financial exploitation and adviser obligations</b> Speaker: Jack Conway, Hamilton Locke</p> <p>This essential ethics session explores the increasing risks of elder abuse and financial exploitation in private client and estate planning matters, and the practical role advisers play in identifying and responding to warning signs. The session will consider how to manage situations involving diminished capacity, undue influence and complex family dynamics, including where instructions may be pressured or manipulated. Participants will also be provided with practical strategies to protect vulnerable clients, manage ethical and professional obligations, and safeguard the tax practitioner through appropriate documentation, escalation pathways and risk controls.</p>

# Presenters

**Sam Baring** is a Partner at Hall & Wilcox and specialises in helping clients work through and achieve their estate and succession planning goals. He also has extensive experience in advising self-managed superannuation fund trustees and members in respect of operation and structure, planning for the disposition of death benefits, and the exercise of trustee discretion regarding death benefit payments. Sam is driven to achieve positive outcomes for his clients in their personal and business succession planning and enjoys the challenge of guiding his clients through this difficult process in a sensitive yet practical manner. He listens to his clients and considers all the issues to understand them, before creating a tailored strategy to meet their specific needs. Sam has worked with a broad range of clients, from those with young families to some of Australia's largest family groups, as well as business owners and people transitioning into retirement. This has provided Sam with a practical insight into a broad range of issues that can arise at all stages in life.

**Jack Conway** is Special Counsel with Hamilton Locke in its national private clients practice, and is based in Melbourne. Jack acts for a variety of private clients in the areas of estate and

succession planning, administration of estates and trusts, disputes and litigation, and guardianship and decision-making by persons with a disability. Jack enjoys advising and acting in complex matters with tax, superannuation, trust law and cross-border issues. Jack is an Accredited Specialist (Wills & Estates) with the Law Institute of Victoria, and a member of various industry bodies including the Tax Institute. In 2025 Jack and Hamilton Locke were recognised by Doyle's Guide in the category of Wills, Estate and Succession Planning in Victoria.

**Tracey Dunn** is as Director with EY, Private – Tax in Perth. Tracey has a Bachelor of Business (Accounting), a Graduate Certificate in Commercial Law, a Bachelor of Laws and a Graduate Diploma in Legal Practice. Tracey was admitted as a lawyer in the Supreme Court of Western Australia in May 2022. Tracey has worked in public practice for over 20 years. Prior to commencing a career in public practice, Tracey worked in commerce in various roles. Tracey's expertise lies in providing both simple and complex tax advice to high wealth high net worth individuals, private groups, small and medium-sized businesses, and corporate entities. She has significant experience in advising on the application of FBT,

Div 7A and trusts and regularly presents on taxation topics.

**Dung Lam, CTA**, is a Principal at West Garbutt and is based in Sydney. Dung has more than two decades of experience in advising on a wide variety of taxes including income tax, capital gains tax, GST and state taxes such as duty, payroll tax and land tax. Dung also has extensive experience advising on taxation trusts, superannuation issues in the self-managed superannuation funds arena and tax issues related to estate planning. Dung is a Chartered Tax Adviser, full member of the Society of Trusts and Estate Practitioners, an accredited Specialist in Business and Personal Tax with the NSW Law Society, a member of the Business Law Section Taxation Committee of the Law Council of Australia and a member of the NSW Law Society Liaison Committee with the Revenue NSW. Dung advises a broad range of clients ranging from corporates, small to medium enterprises, high net worth individuals, professional firms, accountants, financial planners and their clients.

**Kaitilin Lowdon, ATI**, is a Principal Lawyer in Sladen Legal. She acts for a diverse range of clients, including (ultra) high net wealth individuals, family offices and business enterprises. Her

expertise includes advising clients on high-profile and complex tax matters, including reviews, audits and litigation, and transactions, across a wide range of taxation matters.

**Kimberley Martin** B.A. LL.B. (Hons), LL.M, TEP is a Director at WMM Law. Kimberley's range of expertise includes estate planning, tax, business succession, trusts and superannuation law, with a particular emphasis on complex needs, international, and high net worth estate planning. She is also experienced in the area of not-for-profit law. Kimberley holds a Master of Laws (LL.M) in Wills & Estates and is recognised for her influential role in the legal profession at the state, national, and international levels. Her contributions through committee work, publications, and media engagements have earned her international recognition. Her work has been published in 56 countries and featured on platforms such as ABC's 7:30 program, The Age, and the Sydney Morning Herald. Additionally, she has been published in renowned legal journals, including the Global STEP Journal and the American Bar Association Magazine. Kimberley has been recognised in DoYLES Guide for 2025 as a preeminent Tasmanian Wills, Estates & Succession Planning Lawyer.

# Presenters

**Daniel Smedley, CTA**, enjoys helping private enterprise clients solve complex taxation and trust law issues. He is a trusted confidant in planning the succession of his clients' personal and business affairs. Daniel is a Chartered Tax Adviser (The Tax Institute) and an Accredited Specialist in Taxation Law (Law Institute of Victoria). He is recognised by his peers in Doyles Guide and Best Lawyers for his work in Taxation, Trusts and Succession Planning. Daniel is a regular presenter at state and national industry conventions, conferences and workshops.

**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.

**Lisa To, CTA**, is a Partner at Bartier Perry Lawyers with over 20 years' experience in federal and state taxation, superannuation, trusts, estate planning and business succession. She provides clear advice to accountants, advisers and clients across all aspects of tax, wealth protection and succession strategies. Lisa's focus is resolving disputes with the ATO and State Revenue authorities including early engagement and reviews under the ATO's Next 5000 and Top 500 programs. Lisa thrives on cutting through the complexity of tax and entity structuring to get the results her clients need. Her passion for influencing legal policy means she is engaged with evolving legal issues from new developments in revenue law to examining the ATO's risk review focus. Lisa is an SMSF Specialist with the SMSF Association, committee member of the Law Society of NSW's Revenue NSW Liaison Committee, and its Elder Law, Capacity & Succession Committee. She is recognised as a Leading Lawyer in both Tax Law and Estate & Succession Planning by Doyle's Guide and was awarded the Lawyers Weekly's 2022 Tax Partner of the Year.



# Event information

## Confirmation of registration

Please note you will receive two separate emails in the form of a tax invoice at the time of payment and a confirmation email at registration completion.

## Continuing Professional Development (CPD)

Attendance at the conference counts for 8 hours of CPD with The Tax Institute.

## The Tax Institute's attendee hub

This event will be accessible to all delegates via our dedicated attendee hub. Program information, materials (technical papers and presentations), survey forms and more will be available via The Tax Institute's virtual attendee hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the attendee hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual attendee hub by email.

## Delegate list

A delegate list will be included on the attendee hub to assist with networking. Please indicate at the time of registration if you do not want your name to be included. Alternatively, you can edit your profile visibility settings in the virtual attendee hub at any time during the event.

## Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

## Privacy

We take your privacy seriously, and our policy can be viewed at:  
<https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer>.

## Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au).



# Registration

## Registration inclusions

Online access to presentations and technical papers

### Full registration

This registration option entitles one delegate to attend the entire event.



## Event Materials

The materials for this event will include a detailed PowerPoint presentation and the recorded live session. Additional supporting resources may be provided by the presenters at their discretion.

## Discounts

### Early bird registration

All registrations received and paid on or before Friday, 13 March 2026 will be entitled to an early bird discount.

### Group discounts

Purchase three full registrations (early bird or standard) and receive a fourth full registration for free. The free fourth registration must be of equal or of less value to the four paid registrations.

This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm, and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

Register now!



Register online ▶

Register via form ▶  
included in this brochure



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 see page 8 for registration inclusions.

### Full registration – 8 CPD hours

	Member	New member*	Non-member
<b>Early bird registration</b> Register on or before 13 March 2026	<input type="checkbox"/> \$695	<input type="checkbox"/> \$1,090	<input type="checkbox"/> \$995
<b>Standard registration</b> Register after 13 March 2026	<input type="checkbox"/> \$895	<input type="checkbox"/> \$1,290	<input type="checkbox"/> \$1,195

I understand that the registration fees do not include printed materials. Access to materials will be electronic.

### \*Become a member and save!

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and:

- save over \$230 on Affiliate membership on the first 12 months
- access member-only prices to this and future events
- access all member-only technical resources.

Find out more about membership at [taxinstitute.com.au/membership](http://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**

## 3 Payment summary

Registration fees

\$

**Total payable**

\$

Please note: The Tax Institute cannot accept responsibility for delegates' late flight arrivals. Transfer costs are non-refundable and non-transferable.

## 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

## 4 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](http://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](http://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](mailto:customeradmin@taxinstitute.com.au)

Mail Level 21, 60 Margaret Street, Sydney NSW 2000

Online [taxinstitute.com.au](http://taxinstitute.com.au)

Join the conversation

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