The Tax Institute

Local Tax Club Sydney

25 February – 24 November 2026

Hall & Wilcox, Sydney

1.5 CPD hour per session

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Join your Local Tax Club today!

The latest hot topics in tax and local connections

Looking to stay on top of the latest in tax while connecting with like-minded professionals in your area? Your Local Tax Club is the perfect way to keep your knowledge fresh, expand your network, and stay informed about the key tax topics that matter to you and your clients

Each local tax club features **10 monthly sessions**, running from **February to November** covering a specialist tax topic presented by a subject matter expert. Included also is a comprehensive monthly tax update to keep you informed about Australia's constantly evolving tax landscape.

Our flexible registration options mean you can register for the full series or just select the sessions you wish to attend. You can also get your team Involved with a company subscription and send a different team member to each session, which is a great way for them to enhance their knowledge and establish their networks within the profession.

Join your Local Tax Club today and gain access to valuable resources, deeper professional connections, and up-to-the-minute tax knowledge to keep you ahead of the curve.

Who should attend?

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

Schedule

25 February – 24 November 2026

1.5 CPD hours per *session*

Hall & Wilcox, Sydney

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.

5 session subscription

5 session credits to use throughout the year at the discounted price allowing you to choose which months you would like to attend.

Individual sessions

Tailor your attendance by simply indicating your preferred session/s on the registration form.

Technical Program

Date/Time	Session	Presenter
Wednesday 25 February 7:30 – 9:00am AEDT Hall & Wilcox Level 18/347 Kent St Sydney	**Part 1: SMSF General update** With ongoing reform in the superannuation system and increasing regulatory scrutiny, SMSF advisers need to stay across the latest developments to properly guide their clients. This session provides a comprehensive update on recent superannuation regulatory changes, particularly those affecting SMSFs, and explores the practical impact of current government proposals on trustees and members. Graeme will also examine the most recent ATO rulings relevant to SMSFs, highlight emerging compliance issues, and review topical case law to help practitioners understand the key risks and opportunities in the year ahead.	**Special topic presenter:** Graeme Colley, Auditors Institute **Tax update presenter:** Emily Halloran, ATI, Brown Wright Stein Lawyers
Tuesday 24 March 7:30 – 9:00am AEDT Hall & Wilcox Level 18/347 Kent St Sydney	**Part 2: Managing Tax Disputes** The Australian Taxation Office has been ramping up enforcement action against taxpayers and older tax debts. This session will provide practical guidance on steps you can take to manage those disputes for your clients, including how to deal with Director Penalty Notices, methods of negotiating including what factors to put forward and how to apply for remissions of penalties of interest. Aside from the underlying legal issues, commercial considerations need to be considered, and this session will deal with the practical skills of managing those disputes to get the best outcome for clients.	**Special topic presenter:** Michael Cranston, FTI, Waterhouse Lawyers **Tax update presenter:** Bradley White, Hall & Wilcox Lawyers
Tuesday 28 April 7:30 – 9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 3: ATO Litigation** As the ATO continues to expand its litigation activity, taxpayers and advisers are increasingly required to navigate complex dispute pathways and enforcement strategies. This session provides an overview of key litigation themes and recurring issues that arise when matters progress beyond audit and objection, including: • The lifecycle of a taxpayer’s Part IVC rights for review of tax decisions; • Judicial review as an alternative pathway to Part IVC disputes to challenge tax and debt decisions such as garnishes and director penalty notices; • Some of the ATO’s debt recovery ‘firmer action’ litigation tactics, including bankruptcy and winding up; • Freezing orders and Family Court interventions; and • The scope, benefits and limitations of legal professional privilege.	**Special topic presenter:** Simon Cho, Hall & Wilcox Lawyers **Tax update presenter:** Hayden Rudd, CTA, Brown Wright Stein Lawyers

Tuesday 26 May 7:30 – 9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 4: Year End Tax Planning** As the end of the financial year approaches, taxpayers and advisers face increasing pressure to manage tax positions, optimise outcomes and address ATO focus areas before 30 June. This session provides practical strategies, technical updates and key considerations to ensure effective year-end tax planning for individuals, private groups and SMEs.	**Special topic presenter:** Warren Smith, CTA, Brentnalls
Tuesday 23 June 7:30 – 9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 5: Family Trust Elections & Family Trust Distribution Tax** The ATO has increased its focus on Family Trust Elections (FTEs) and Family Trust Distribution Tax (FTDT) under the Tax Avoidance Taskforce. This session outlines why these issues matter for private groups, the key risks, and the practical steps advisers should take to remain compliant. Key Points: • Why ATO scrutiny is increasing; • Tips and traps when making FTEs and IEEs; • When FTDT applies and its financial impact; • Governance considerations to prevent costly mistakes; and • Planning for long-term and intergenerational implications.	**Special topic presenter:** Jane Harris, CTA, Brown Wright Stein Lawyers **Tax update presenter:** Anna Rizzo, CTA, Demasi & Company Services
Tuesday 21 July 7:30 – 9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 6: State Taxes - Land Tax** As land values continue to rise across NSW and thresholds remain frozen, land tax is emerging as a significant cost for property owners, particularly those relying on exemptions. This session provides a detailed analysis of the Principal Place of Residence (PPR) and Primary Production exemptions under the Land Tax Management Act 1956 (NSW), with a focus on recent legislative changes and judicial decisions that have narrowed eligibility. We will explore the 2024 amendments to the PPR exemption, including the 25% ownership threshold, and dissect complex Tribunal and Court rulings that have reshaped the interpretation of “dominant use” for primary production. Attendees will gain practical insights into exemption substantiation, audit risk management, and the broader implications of the complexity of the provisions in a high-value property environment.	**Special topic presenter:** Matthew McKee, FTI, Brown Wright Stein Lawyers **Tax update presenter:** Charm Jayatileka, Kelly+Partners
Tuesday 25 August 7:30 – 9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 7: Managing Employer Tax and Superannuation Obligations** Structuring arrangements with a workforce and managing ongoing compliance obligations can be complex, with a range of tax and superannuation obligations to consider. This has become even more complex with recent changes to employment laws, ongoing developments in common law relating to superannuation and payroll tax, and the introduction of the Payday Super regime. This session will take you through some of the key issues to consider when structuring arrangements with your clients’ employees and contractors, including in relation to PAYG withholding, superannuation and payroll tax, and how to manage instances of non-compliance that may arise.	**Special topic presenter:** Todd Bromwich, Hall & Wilcox Lawyers **Tax update presenter:** Kate Wittman, SW Accountants & Advisors

Tuesday 22 September 7:30 - 9:00am AEST Hall & Wilcox Level 18/347 Kent St, Sydney	**Part 8: Estate Planning and Testamentary Trusts** The use of a testamentary trust is a common estate planning tool for individuals with larger estates, vulnerable beneficiaries who need to be protected and also to deal with a blended family situation. In this session we consider current and perennial tax issues in establishing and administering a testamentary trust including: • The minor child tax concession provided by a testamentary trust; • Receiving superannuation death benefits in a testamentary trust; • Franking credits and family trust elections in the context of a testamentary trust; • Land tax surcharges and main residences in a testamentary trust; and • Distribution of assets from the testamentary trust.	**Special topic presenter:** Dung Lam, CTA, West Garbutt **Tax update presenter:** Bradley White, Hall & Wilcox Lawyers
Tuesday 27 October 7:30 - 9:00am AEDT Hall & Wilcox Level 18/347 Kent St, Sydney	**Part 9: Accidental Property Developers - Mum and dad** With increasing land value and scarcity, unlocking the value in land held by families can become a very creative pursuit. Such creativity can often lead to landholders inadvertently (or accidentally) becoming part of, or adjacent to, a property development activity. This session will explore the tax implications for individuals who may become "accidental" property developers, including: • The importance of the main residence exemption (MRE) and its impact on tax liability; • Capital / revenue issues when seeking to unlock value in long-held land assets; and • Relevant compliance activity from the ATO. Scenarios covered: • Simple subdivisions; • Re-development and part-hold, part-sell of land; and • Project delivery agreement (PDA) or joint venture (JV) activities.	**Special topic presenter:** Sam Ayoubi, AHS Legal **Tax update presenter:** Tiana Dumanovsky, Bartier Perry
Tuesday 24 November 7:30 - 9:00am AEDT Hall & Wilcox Level 18/347 Kent St, Sydney	**Part 10: Division 296 Tax: How It Works, and How Super Stacks Up** Division 296 is now law, and commences in the 2026-27 income year. In this session we'll look at how the assessment and collection process works, including the calculation methodology. Most importantly, with headline tax rates of 30% applying to earnings attributed to balances in excess of $3 million, and 40% above $10 million, how does super stack up against other investment structures, with and without the Fed Budget changes. Should clients stay in super?	**Special topic presenter:** David Barrett, CTA, PAX Services **Tax update presenter:** Leon Khoury, CTA, Luca Partners

Presenters

Sam Ayoubi is the Principal of AHS Legal, a boutique law firm providing tax and legal services to accountants, lawyers, private groups and property enterprises. Prior to AHS Legal, Sam worked as a Chartered Accountant and lawyer in accounting and law firms ranging from small and second-tier firms to 'Big 4' consulting firms. Sam has also delivered tax education to accountants, lawyers and Government bodies across Australia.

David Barrett, CTA, is Director at PAX Services. He has more than 30 years' experience in the financial services industry, including more than 25 years at Macquarie Bank, and has held positions elsewhere in technical services, financial planning and insurance. David's expertise lies in advice law, superannuation and related tax legislation, personal international taxation and retirement income systems. With a passion for clear and simple explanation of complex technical issues, David has presented for more than two decades for Macquarie, CPA Australia, the SMSF Association, FINSIA and The Tax Institute.

Todd Bromwich is a Special Counsel in Hall & Wilcox's Tax team with extensive experience advising clients on strategic tax planning and structuring and managing early-stage and litigated disputes with Federal and state taxation authorities. Todd has a particular focus on the taxation of trusts and international private wealth taxation for individuals and family groups, and on employment taxes for businesses including remediating complex wages and superannuation underpayments. Todd is also a senior member of Hall & Wilcox's cross-practice Charities, Not-for Profit & Philanthropy team, assisting individuals and family groups to achieve their philanthropic goals.

Simon Cho is a Senior Associate in the Dispute Resolution team at Hall & Wilcox. Simon is an experienced litigator, with a focus on tax and financial services disputes. He was previously a lawyer in the ATO's litigation team (now Litigation and Legal Services) and has extensive experience in Part IVC tax disputes as well as in ATO debt recovery actions. Simon holds a Bachelor of Laws from UNSW and a Master of Laws from the University of Sydney.

Graeme Colley is a well-known figure in the SMSF community with a long-standing reputation as an accomplished educator, technical expert and advocate for the sector. He is currently an ambassador for the Auditors Institute and Executive Education Facilitator with the AGSM at the University of NSW. He brings over 30 years of taxation and superannuation experience gained from a wide range of senior positions in the public and private sectors. Graeme contributes to many industry publications and is a joint author of the CCH Master Financial Planning Guide and Financial Planning in Australia. In addition to his work with the UNSW, his academic teaching experience extends to the Master of Commerce (Financial Planning) at the University of Western Sydney. Graeme is a qualified SMSF Specialist Advisor (SSA) and a Member of the Chartered Accountants Australia & New Zealand (CAANZ).

Michael Cranston, FTI, has an extensive background in taxation matters including a 40-year career in the Australian Taxation Office, the last 10 as Deputy Commissioner for privately owned groups and businesses and wealthy individuals. Michael represented the ATO in many forums such as the cross-agency phoenix forum, serious financial crime, senate and the tax revenue parliamentary committees and international OECD forums including chairing the international taskforce on tax crimes. For the past 6 years Michael has been a partner in Waterhouse Lawyers providing tax advice and engaging with the ATO on tax audits and disputes. Michael through his experience understands the complex tax laws, commercial aspects of business and difficulties facing taxpayers. Michael's strong mediation skills allow him to negotiate and achieve the best result possible for taxpayers. Michael has a Master of Taxation Law, is a qualified accountant and a fellow of the Tax Institute. Michael loves playing golf and enjoys being a grandfather and a fine red.

Tiana Dumanovsky advises on a range of complex tax matters including with respect to income tax, GST, Stamp Duty, and Land Tax. Tiana also provides strategic and tailored estate and business succession planning to clients, and has successfully submitted ACNC registration applications, ATO private ruling applications, and applications for concessions and exemptions under State taxes. She has experience providing advice to accountants, financial advisers, family offices and high wealth individuals and their families.

"The Local Tax Club is more than just a technical update. It's an opportunity to connect with peers, stay across the issues shaping our profession, and engage in meaningful discussions that enhance your practice. The engaging topics, expert insights, and strong sense of community make these mornings something you will genuinely look forward to. Join us and experience the value for yourself."

Hayden Rudd, CTA, Brown Wright Stein Lawyers

For event queries please contact the National Events team

nationalevents@taxinstitute.com.au
1300 829 338

Emily Halloran, ATI, is a Senior Lawyer at Brown Wright Stein Lawyers. With experience across commercial and taxation law, Emily assists clients in providing tax advice and responding to ATO and Revenue NSW tax audits. Emily is an admitted Solicitor of the Supreme Court of NSW and holds a Diploma of Languages, Bachelor of Economics, and Bachelor of Laws from the University of Sydney.

Jane Harris, CTA, is a Senior Associate at Brown Wright Stein Lawyers with over 15 years of experience assisting high net wealth and SME clients with taxation matters. With a background in accounting and business services, Jane provides tax and commercial advice to accountants, small to medium enterprises and private clients. Jane was awarded the Tax Institute's NSW Tax Trailblazer Award for 2025. Jane is an admitted Solicitor of the Supreme Court of NSW and holds Bachelor of Commerce, Bachelor of Arts, Juris Doctor and Master of Law degrees from the University of Sydney.

Charm Jayatileka is a qualified lawyer and specialises in tax law. She completed her LL.B. in England and has also completed an MBA in Finance. In 2025, Charm received the Dean's Medal for her LL.M. She currently works at Kelly Partners as a Senior Consultant and lawyer. Charm advises private clients including large corporations, family groups and high net worth individuals from diverse industries. Her areas of tax expertise include corporate tax and structures, cross-border transactions, and capital gains tax.

Leon Khoury, CTA, is a co-founder and partner of Luca Partners, with more than 15 years of experience in public practice, taxation and corporate advisory. As a Chartered Accountant and Chartered Tax Adviser, he brings deep technical skills in Australian tax law. Leon has advised clients across a wide range of industries, gaining significant experience in diverse tax environments and tailoring practical, commercially sound strategies. Throughout his career, Leon has led multidisciplinary engagements across corporate recovery and insolvency, CFO, business services and advisory. Having held senior positions at respected accounting and advisory firms, he is recognised for making complex tax concepts clear, relevant, and actionable, while always keeping strategic outcomes at the forefront. At Luca Partners, Leon leads with a relationship-driven advisory philosophy. He believes great tax advice is not simply about minimising risk, but about unlocking opportunity, enabling smarter decisions, and supporting long-term wealth creation for businesses and families. Outside of work, Leon enjoys sports, music, politics, and spending time with his young family.

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 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.

Matthew McKee, FTI, is a Partner of the Sydney law firm Brown Wright Stein Lawyers. Matthew assists accountants and lawyers in advising their clients on all aspects of tax and superannuation for SMEs and high net wealth individuals and family groups.

Kelly McNeill is a Director at Boroughs Australia, where she advises a broad range of private business and personal clients on tax compliance and advisory matters. She specialises in structuring and intergenerational wealth planning, providing clear, practical, and commercially focused advice that helps clients make informed decisions in complex financial situations. Kelly is a member of Chartered Accountants Australia and New Zealand and The Tax Institute and holds a Master of Taxation and a Bachelor of Commerce from the University of New South Wales.

Anna Rizzo, CTA, is a senior accountant with chartered accountancy practice Demasi & Company Services P/L. With over 30 years' experience in providing accounting and taxation services to individuals and SMEs across various industries, she has become a trusted and valued advisor to her clients. Anna is a Fellow Chartered Accountant (CA ANZ), a Chartered Tax Advisor (The Tax Institute), Registered Tax Agent, and holds a Bachelor of Commerce (Accounting) degree from the University of Western Sydney.

Hayden Rudd, CTA, is a Senior Lawyer at Brown Wright Stein Lawyers. Hayden's practice includes a mix of tax and commercial work. Hayden's experience includes preparing applications for private rulings, objections and liaising on behalf of clients with both the Australian Taxation Office and Revenue NSW.

Warren Smith, CTA, has been advising business owners and accountants on a broad range of commercial and taxation issues over his 20 years in practice. Warren is the lead tax partner at Brentnalls and looks after a number of high wealth families and their business interests. He has extensive experience in business structures, trusts, deceased estates, property transactions, and ATO engagement including private rulings and objections. Warren holds a Master of Taxation, is a Chartered Accountant and Chartered Tax Adviser.

Bradley White is a senior associate in Hall & Wilcox's Tax team, with a specialisation in state tax-based matters, advising clients nationwide. Bradley assists clients with their tax structuring, tax controversy, and tax planning needs, and has both federal and state tax expertise. Bradley has particular experience engaging with different state and territory revenue authorities on behalf of clients and objecting to, or applying for, exemptions with respect to land tax, duty and payroll tax issues. Bradley's clients are predominantly small-to-medium businesses and high net-worth family groups, with a focus on property development, agriculture, not-for-profit and health sectors.

Kate Wittman of SW Accountants and Advisors has over 6-years' experience in tax. She began her career in the US with PwC in their International Tax Services team and also holds a US CPA license. In 2021 she permanently moved to Australia and has building her knowledge and experience of the Australian tax system. Her areas of interest include: trusts, tax structuring and international tax issues.

The Tax Institute

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	New member*	Non-member
Single session subscription	☐ $100	☐ $495	☐ $150
5 pack	☐ $350	☐ $745	☐ $500
10 pack	☐ $700	☐ $1095	☐ $1000
Company subscription	☐ $850		

Please select your session/s:

☐ Wed, 25 Feb 44794	☐ Tue, 24 Mar 44795	☐ Tue, 28 Apr 44796	☐ Tue, 26 May 44797	☐ Tue, 23 Jun 44798
☐ Tue, 21 Jul 44799	☐ Tue, 25 Aug 44800	☐ Tue, 22 Sep 44801	☐ Tue, 27 Oct 44802	☐ Tue, 24 Nov 44803

Dietary requirements:

Promotional code:

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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

Name on card:

Card no.: Expiry date: MM/YY

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To register **Email** customeradmin@taxinstitute.com.au **Mail** Level 21, 60 Margaret Street, Sydney NSW 2000 **Online**

The Tax Institute gratefully acknowledges the generous assistance of members of the Organising Committee:

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Todd, Bromwich, Hall & Wilcox Lawyers

Marianne Dakhoul, Brown Wright Stein Lawyers

Jim Koutsokostas, CTA, Hall & Wilcox Lawyers

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