The Tax Institute

Adelaide | Majestic Roof Garden Hotel

Local Tax Club

Mar – Nov 2026

CPD 1.5 / session

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 **5 sessions**, running from **March to November** covering a specialist tax topic presented by a subject matter expert. Included also is a comprehensive bi-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

24 March – 24 November 2026

1.5 CPD hour per session

Majestic Roof Garden Hotel

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.

Individual sessions

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

Technical Program

Date/Time	Session	Presenter
Tuesday 24 March 5.30-7.00pm ACDT Majestic Roof Garden Hotel 55 Frome St Adelaide	**Part 1: Main residence exemption – it's simple right?** A person's main residence in many cases is their most significant asset. The capital gains tax concessions available on a main residence are arguably the most generous in the tax legislation. However, as the rental property market evolves, individuals become more transient and taxpayers look to complement their main income source, the lines have become significantly blurred. Against this background, and in the context of the main residence exemption, this session will explore: • Deriving income from a main residence and change of use; • The commissioner's views regarding holiday homes and rental properties in draft ruling TR 2025/D1 and draft practical compliance guidelines PCG 2025/D6 and PCG 2025/D7; • Rules for apportionment; and • Foreign residents.	**Special topic presenter:** Karen Gregor, CTA, Nexia Edwards Marshall **Tax update presenter:** Paula Hepper, Nexia Edwards Marshall
Tuesday 26 May 5.30-7.00pm ACDT Majestic Roof Garden Hotel 55 Frome St Adelaide	**Part 2: Current issues in payroll tax** This session will discuss a concise overview of the key developments shaping payroll tax today, providing clarity on employer obligations, contractor arrangements, grouping rules and available exemptions. Some of the key discussion points are: • What is captured in the payroll tax definitions of employee and wages; • Non-employment relationships and application of the relevant contract provisions – including exemptions and recent cases; • The operation of the grouping provisions; • Employment agency provisions and recent cases; and • Payroll tax exemptions.	**Special topic presenter:** Jessica Pengelly, CTA, Pengelly & Co Legal **Tax update presenter:** Richard Lyons, WRP Legal

Tuesday 28 July 5.30-7.00pm ACST Majestic Roof Garden Hotel 55 Frome St Adelaide	**Part 3: Revenue / capital distinction in property transactions** This session will review the law and consider recent developments and some topical issues arising in the taxation treatment of profits on the sale of land, including: • The distinction between mere realisation of a capital asset, a one-off profit making scheme and carrying on a business; • How intention is determined and evidentiary issues – significance of use of a special purpose vehicle; • The significance of passive or active participation by an owner and recent cases concerning large-scale subdivision involving 3rd party partnerships; and • Differences from a GST perspective and recent cases.	**Special topic presenter:** Sam Ure, FTI, Jeffcott Chambers **Tax update presenter:** Nicholas McCann, WRP Legal
Tuesday 22 September 5.30-7.00pm ACST Majestic Roof Garden Hotel 55 Frome St Adelaide	**Part 4: Estates, testamentary trusts and non-residents - Navigating continuance, compliance and timelines** The administration of estates and the creation of testamentary trusts continue to raise complex tax and compliance questions for practitioners. This session considers when an estate is considered to have ended, when a testamentary trust should commence, and how to navigate the tax implications that arise, including where non-residents are involved. This session will explore: • Distinguishing between the continuation of an estate and the point at which a testamentary trust requires its own TFN; • Key milestones in the administration of a deceased estate; • Issues in the administration of testamentary trusts; and • Non-resident executors and beneficiaries and issues arising.	**Special topic presenter:** Julie van der Velde, CTA, VdV Legal **Tax update presenter:** Lucy Simeoni, WRP Legal
Tuesday 24 November 5.30-7.00pm ACDT Majestic Roof Garden Hotel 55 Frome St Adelaide	**Part 5: Family trusts under pressure – Navigating control tests, elections and emerging professional risks** The regulatory landscape for family trusts has become increasingly complex, with advisers grappling with rigid rules, escalating compliance risks and a lack of practical mechanisms to correct innocent mistakes. This session takes a look at the challenges surrounding control tests, trust elections and the broader professional pressures now affecting practitioners. This session takes a closer look at: • The requirements and consequences of making Elections; • Unpacking the uncertainty surrounding the family control test and its practical application; • Clarify key pressure points in FTE and IEE rules and their inflexibility; and • Examine the consequences of being unable to correct minor, good-faith errors.	**Special topic presenter:** Neil Oakes, CTA, Perks **Tax update presenter:** Lee Jurga, Perks

Presenters

Karen Gregor, CTA, is a Tax Director in Nexia Edwards Marshall's Business Consulting and Taxation Division. Karen has over 25 years' experience advising clients particularly in difficult areas of taxation law, including GST and CGT. Her approach is solutions-oriented, even when the legislation is ambiguous. She provides practical commercial tax advice working with clients throughout the life cycle of their business by advising them during its establishment, operation and cessation including restructures, exit strategies and winding up.

Paula Hepper is a Manager at Nexia Edwards Marshall in their Business Consulting and Taxation Division. She has close to 20 years' experience advising SME clients and providing accounting and taxation solutions across multiple industries including health, construction, law and hospitality, specialising in agriculture and rural business.

Lee Jurga is an Associate Director in the Tax Consulting Team at Perks in Adelaide. He has 17 years of both private and public sector experience advising on State and Federal taxation issues. He currently advises SME clients and high net worth individuals on a range of taxation issues and tax effective restructuring and succession strategies from both a State and Federal tax perspective.

Richard Lyons is a Senior Associate at WRP Legal. He has a Bachelor of Arts (Honours) from the University of Melbourne, as well as a Juris Doctor and a Master of Laws from the University of Sydney. Richard is admitted to practise law in South Australia and in the Federal courts. Through his work at national and international law firms, Richard has extensive experience in taxation law, with a focus on tax structuring issues, CGT concessions, and tax disputes.

Nicholas McCann is a Senior Associate at WRP Legal & Advisory. He holds a Bachelor of Laws (Honours) and a Bachelor of Commerce (Honours), majoring in Accounting, from the University of Adelaide. Nicholas has extensive experience in taxation advisory and dispute resolution, including preparing submissions to federal and state revenue authorities. He advises on taxation planning and structuring, commercial transactions, asset acquisitions and disposals, compliance, restructures and not-for-profit matters. Nicholas works with practitioners and professional advisers to deliver practical tax and commercial advice to a diverse client base, including high-net-worth individuals, family groups, large companies and not-for-profit organisations. He is a member of the Law Society of South Australia and tutors Financial Accounting at the University of Adelaide.

Neil Oakes, CTA, is a Tax Director at Perks Chartered Accountants and holds a Masters Degree in Tax Law from UNSW (Atax). Neil currently heads up the Technical Tax consulting division within Perks. He specialises in providing commercially focused tax advice to a wide range of clients.

"Being part of the Local Tax Club has given me dedicated time to stay sharp technically while building meaningful connections with colleagues and peers"

Amanda Trewartha, Long Tail Asset Management

For event queries please contact the National Events team

nationalevents@taxinstitute.com.au
+1300 829 338

Jessica Pengelly, CTA, is a Director at Pengelly & Co Legal in Adelaide. Jessica has over 15 years' experience working tax and revenue law, and practices across a range of tax areas in both tax advisory and tax disputes. Jessica specialises in indirect taxes, and is highly regarded for her deep experience in GST. Given her depth of experience, Jessica has worked with businesses in the property development, banking, financial services, food and beverage, not-for-profit and insolvency industries to resolve complex GST issues and deliver commercially-focussed outcomes.

Prior to joining Pengelly & Co Legal, Jessica worked for the ATO and was part of the ATO's tax Counsel Network, specialising in international tax and GST, with a sub-focus on the GST treatment of food and beverages. Jessica is a regular speaker for the Tax Institute and has authored a number of papers and presentations on topical GST issues.

Lucy Simeoni is a Director at WRP Legal. She specialise in commercial tax, Lucy advises clients on income and capital gains tax, GST, stamp duty, payroll tax, and state and federal taxation disputes. She works with a diverse client base, from small enterprises to large private businesses and high-net-worth individuals, with notable expertise in the pharmacy and retirement village sectors.

Her skillset extends to business structuring, restructuring, acquisitions, and sales. A recognised specialist in charities and not-for-profit law, she also provides strategic advice on corporate, commercial, trust, and partnership matters.

She is a member of The Tax Institute SA State Council and chair of The Tax Institute Women in Tax Committee.

Raoul Stevenson, CTA, is a Partner in Business Consulting Services at Nexia Edwards Marshall. He has over 15 years' experience working with a broad range of clients from small family operated businesses to large corporate groups and provides services ranging from consulting to tax compliance and management accounting. He has an in depth knowledge of income tax, FBT and WET.

Sam Ure, FTI, is a barrister practising in tax, trusts and superannuation. Sam has appeared in numerous State and Federal tax cases. He has advised both taxpayers and revenue authorities in many reviews and audits. Sam also practises in commercial disputes, administrative law and regulatory proceedings.

Julie Van der Velde, CTA, TEP is the principal of a specialised commercial law firm, VdV Legal. With over 25 years' experience advising Australian businesses, her practice focuses on taxation and trust law with an emphasis on business structuring, tax planning, business succession and intergenerational transfers. Julie is The Tax Institute's SME Chartered Tax Adviser for 2017 and a regular speaker for the Tax Institute and other professional organisations.

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	New member*	Non-member
Full series 5 pack	☐ $350	☐ $745	☐ $500
Single session	☐ $100	☐ $495	☐ $150

Please select your session/s:

☐ Tue, 24 Mar 44948 ☐ Tue, 26 May 44949 ☐ Tue, 28 Jul 44950 ☐ Tue, 22 Sep 44951 ☐ Tue, 24 Nov 44952

To register for a single session please complete this registration form and email to customeradmin@taxinstitute.com.au

Dietary requirements:

Promotional code:

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- access member-only prices to this and future events
- access all 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: 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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For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

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

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

Sonja Bollinger, CTA, Catholic Archdiocese of Adelaide

Michael Loffler, CTA, Trellis

Jessica Pengelly, CTA, Pengelly & Co Legal