The Tax Institute

Tax in Practice Perth

22 April – 21 October 2026

Multiple location – Perth CBD

1 CPD hour per session

4:30pm - 6:00pm

Be part of the Tax in Practice series today!

A space for emerging professionals to share ideas and build their network.

Following a successful launch last year, we are excited to bring the series back in 2026 – created specifically for next generation tax professionals with around five years' experience who are ready to take the next step in their careers.

Stay ahead of the curve by joining the conversation on the latest tax developments while building genuine connections within your local tax community.

The Tax in Practice Series is designed exclusively for early career practitioners. It provides a focused, supportive environment to deepen your technical knowledge, broaden your perspective and strengthen your professional network alongside peers at a similar stage of their career.

This year's program features four engaging sessions, held bi-monthly from April to October. Each session will explore a timely and practical topic, delivered by a subject-matter expert and tailored to professionals with approximately five years' experience. Sessions conclude with networking and light refreshments, giving you the opportunity to continue the discussion and expand your connections.

With flexible registration options, you can attend the full series for maximum value or select individual sessions aligned to your interests and development goals.

Be part of the Tax in Practice Series to stay informed on emerging tax trends, grow your confidence and capability, and build lasting connections within your local next gen tax network.

Sessions

Part 1: Wednesday, 22 April 2026

Part 2: Wednesday, 1 July 2026

Part 3: Wednesday, 19 August 2026

Part 4: Wednesday, 21 October 2026

Who should attend?

This Tax in Practice series is designed for tax professionals and is suitable for anyone with up to 8-years experience.

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
Wednesday 22 April 4:30-6:00pm WST HLB Mann Judd 4/130 Stirling St Perth WA 6000	**Part 1: FBT** FBT can turn a great year sour for businesses hit with an unexpected tax bill. A busy FBT season can also take precious resources away from accounting firms focused on EOFY tax planning or trying to wrap up lodgements before the May deadline. Whether you need a refresher or you're grossed-up and stressed-out about FBT compliance, this session will discuss pitfalls to avoid and opportunities to seize, including: • Update on FBT changes for 2026 • Overview of common types of Fringe Benefits, including; – Entertainment; – Car Parking; – and Motor vehicles. • Dispelling myths on; – Utes/commercial vehicles; – Food & drink v sustenance, and – Logbooks and record keeping. • How accountants can add value for employers and employees alike.	**Speaker:** Remi Rodari, FTI, HLB Mann Judd
Wednesday 1 July 4:30-6:00pm WST Venue - To be advised	**Part 2: Family Trusts Elections** The heightened focus of the ATO on discretionary trusts and family trust elections (FTEs) is leading to unintended outcomes, with an increasing number of taxpayers facing significant tax liabilities for family trust distributions tax (FTDT) in circumstances where 'distributions' have been made outside of the 'family group'. Complex legislation, combined with the challenges that can arise from deficiencies in record keeping, no statutory amendment period and no legislative discretion for the Commissioner to disregard a distribution for FTDT purposes has led to a 'perfect storm', potentially wiping out family wealth and putting tax agents at risk. This session will explore the potential adverse tax implications of making a distribution outside of the 'family group' and provide practical strategies for advisors in understanding and managing FTEs.	**Speaker:** Tracey Dunn, EY

Wednesday 19 August 4:30-6:00pm WST BDO Level 9, Mia Yellagonga Tower 2, 5 Spring St, Perth WA 6000	**Part 3: CGT and rollovers** This session is designed to deepen the technical understanding of Capital Gains Tax (CGT) and the various rollover relief options available. The session focuses on practical application of the provisions as well as navigating eligibility nuances across key rollover provisions and identifying technical risks and planning opportunities in real-world client transactions. Emphasis will be placed on practical judgement, documentation expectations, and areas where practitioners are increasingly expected to exercise independent technical analysis.	**Speaker:** Mark Pollock, CTA, BDO
Wednesday 21 October 4:30-6:00pm WST Venue - To be advised	**Part 4: Div 7A** Division 7A is almost unavoidable in the private wealth and SME space, and navigating its complex provisions continues to challenge taxpayers (and their advisors). For the next generation of tax practitioners, a solid understanding of Division 7A fundamentals and awareness of common pitfalls is essential to kick-start a successful career in private practice. This session will explore key concepts, highlight frequent mistakes and work through real-world scenarios. Attendees are encouraged to bring along practical problems, questions and experiences to discuss with the group. By the end of this session, attendees will: • Have a clear understanding of the purpose and scope of Division 7A and its key concepts; • Recognise common traps and compliance risks faced by taxpayers; and • Learn practical strategies to manage Division 7A issues effectively.	**Speaker:** Monique Eeson, Birchstone Tax Law and Daniel Taborsky, CTA, Birchstone Tax Law

Presenters

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.

Monique Eeson is an Associate at Birchstone Legal Group where she practices within the tax team advising on complex tax and duty issues. After completing her Bachelor of Laws at Curtin University in 2020, she was admitted to the Supreme Court of Western Australia in 2021. Monique has a particular interest in business and succession planning restructures and the taxation of trusts.

Mark Pollock, CTA, is a Tax Partner with BDO Perth. He has over 30 years of experience providing tax and business advice to a wide range of industries. Mark specialises in adding value to growing private companies and families by working with them to maximise after-tax returns while optimising their financial affairs. Previously, Mark was a Partner at PKF Perth and Chairman of PKF's National and International Taxation Committees.

Remi Rodari, FTI, is a Senior Consultant at HLB Mann Judd and Fellow of the Tax Institute. He holds a Master of Professional Accounting from UWA, a Bachelor of Laws, and a Bachelor of Commerce (Finance) from The University of Notre Dame. Remi primarily advises corporate and international clients on income tax, GST and SGE reporting matters. He also has a keen interest on issues affecting not-for-profits, specifically the unique FBT and payroll tax challenges for employers with a large, remote, or interstate workforce.

Daniel Taborsky, CTA is the managing director and founder of Birchstone Legal Group, which is a boutique law firm specialising in tax, trusts, succession and estate planning solutions for privately owned enterprises and high-net-worth individuals. Daniel has over 17 years' experience advising on tax, duty and trust law issues, including acting for clients in disputes with revenue offices, and has been recognised as a leading tax lawyer by Doyle's Guide since 2020. He works closely with other professionals including accountants, other lawyers, liquidators and financial advisers.

"Staying up to date with tax technical knowledge is essential for any aspiring Tax Professional. Tax in Practice sessions are informal and directed towards the practical application of the relevant law.

Enjoy light refreshments as you expand your expertise and build valuable industry relationships in a friendly and professional setting."

Dudley Elliott, CTA, Trove Advisory

For event queries please contact the National Events team

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+1300 829 338

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 subscription	☐ $80	☐ $475	☐ $120
Single session	☐ $30	☐ $425	☐ $40

Please select your session/s:

☐ Wed 22 Apr 45079	☐ Wed 1 Jul 45080	☐ Wed 19 Aug 45081	☐ Wed 21 Oct 45082

Dietary requirements:

Promotional code:

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- 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:

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☐ 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:

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For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

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

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Rupert Cheong, CTA, Alpha Accountancy Services

Shivani Jethwa, Birchstone Tax Law

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