The Tax Institute



WA Tax Forum

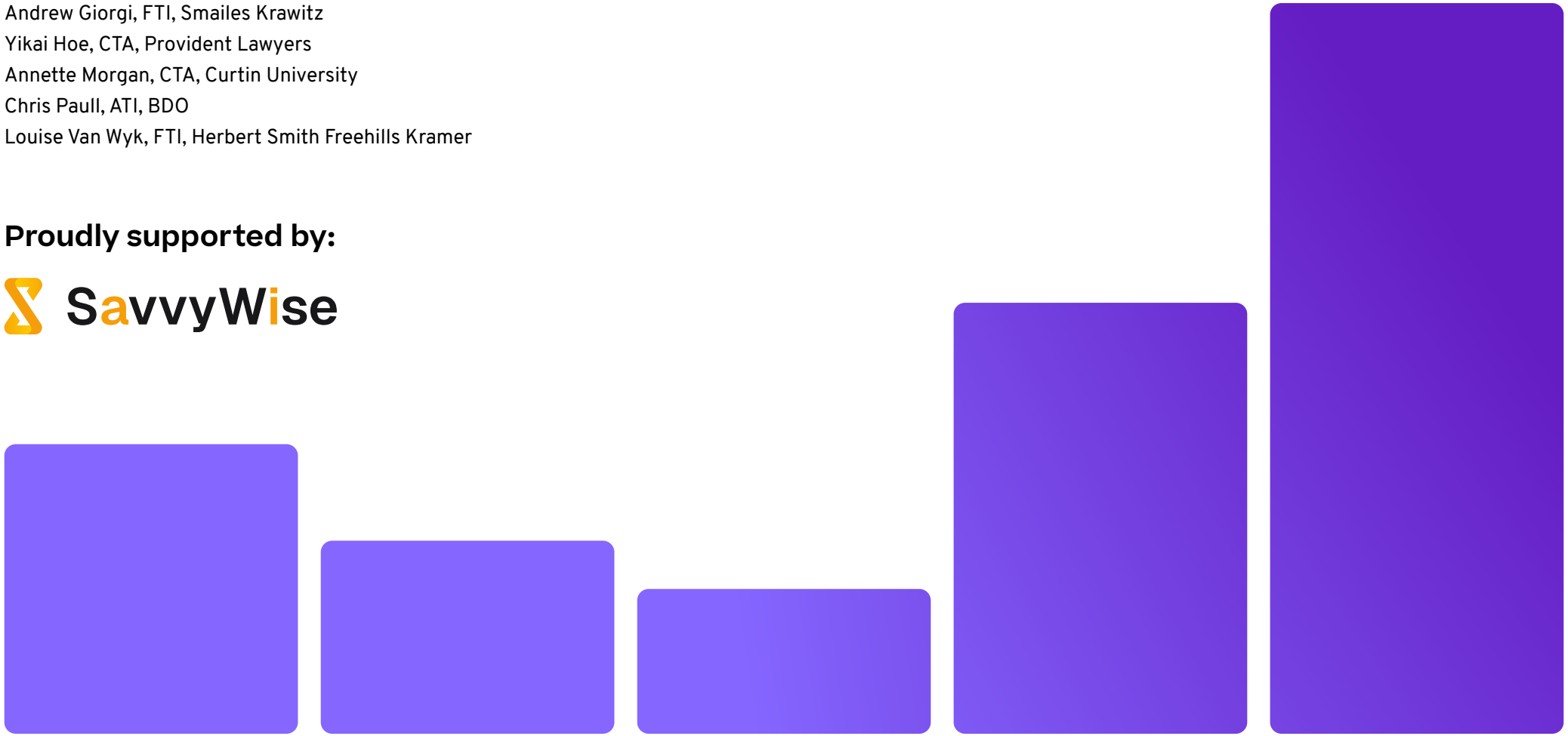
11-12 Mar 2027 | CPD 13

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

Billy-Jo Famlonga, FTI, Famlonga Business Services, Chair, Forum Organising Committee
Simeran Cheema, CTA, SEER Financial Group
Gaurav Chitnis, CTA, HLB Mann Judd
Mike Cooper, CTA, Australian Taxation Office
Tracey Dunn, Birchstone Legal Group
Andrew Giorgi, FTI, Smailes Krawitz
Yikai Hoe, CTA, Provident Lawyers
Annette Morgan, CTA, Curtin University
Chris Paull, ATI, BDO
Louise Van Wyk, FTI, Herbert Smith Freehills Kramer

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Welcome

It's my privilege to welcome you to the 2027 WA Tax Forum, on 11 and 12 March at the DoubleTree by Hilton Perth Waterfront.

Every year, the Organising Committee starts with the same question: what are WA practitioners actually dealing with right now? This program is our answer. It covers the issues that come up in our client meetings, across our desks and in conversations with colleagues. Among them are the latest Part IVA cases, the challenges of valuations and Division 7A, and restructuring ahead of the new regime. We're also tackling newer questions, from AML/CTF obligations to what AI really means for the way we work.

We're delighted to bring three of the country's leading tax practitioners to Perth this year. Karen Goodfellow, CTA will take us through the practical application of CGT, including the elections and "sleeper issues" that can catch practitioners and clients by surprise. Daniel Smedley, CTA will look at where discretionary trusts stand today and where they may be heading. Daniel McInerney KC will take us through Part IVA After the Latest Cases – What We Know Now. They'll be joined by some of WA's most respected local practitioners, who bring the insight that comes from working on the same issues we see in our own practices. We also continue the Walter Gianotti Memorial Address, this year focusing on ATO disputes, a reminder of the people who built this community before us.

My sincere thanks go to my fellow committee members. Their care, expertise and hard work are behind every part of this incredible program.

The Forum has never just been about the sessions. Some of its most valuable moments happen over coffee, in the breaks and at our networking function on Thursday evening. Whether you've joined us many times before or this will be your first Forum, these two days will give you fresh ideas, renewed confidence in your work and the chance to build connections that last well beyond March.

I look forward to seeing you there and hearing the challenges and ideas shaping your practice.



Billy-Jo Famlonga, FTI, Famlonga Business Services
Chair, Forum Organising Committee

Early bird pricing offer
Register on or before Friday 12 February to save!

Technical program

Day 1 Thursday, 11 March 2027

Time *AWST	Session
8:00 – 8:30am	**Registration**
8:30 – 8:45am	**Welcome and Opening Address** Speaker: Billy-Jo Famlonga, FTI, Chair, Forum Organising Committee
8:45 – 9:30am	**Session 1: Economic Update** Speaker: Leo Prendeville, Senior Economist, Chamber of Commerce and Industry WA (CCIWA) This session will provide an overview of global, national and Western Australian economic conditions, business and consumer trends, and strategic insights to support business decision-making.
9:30 – 10:30am	**Session 2: Part IVA After the Latest Cases – What We Know Now** Speaker: Daniel McInerney KC, CTA, Ground Floor Wentworth Chambers The recent run of Part IVA cases has given practitioners plenty to think about. But what principles are actually emerging, and how confidently can they be applied to the next transaction? This session will examine recent cases on Part IVA and what they tell us about the courts' current approach to tax benefits, counterfactuals and dominant purpose. Moving beyond the outcomes themselves, the session will consider the reasoning that mattered, the areas where uncertainty remains and the practical implications for taxpayers and advisers seeking to navigate the line between effective tax planning and Part IVA risk.
10:30 – 11:00am	**Morning tea**
11:00am – 12:00pm	**Session 3: CGT – Practical Issues and Common Traps** Speaker: Karen Goodfellow, CTA, Goodfellow Tax Advisory Capital gains tax remains one of the more complex areas of the tax law, with elections, rollovers and concessions often having significant downstream consequences. This session examines key CGT provisions and highlights practical issues that arise in their application, including: • The requirements and timing considerations for making CGT elections • The operation of key CGT rollovers and available reductions • Identifying common "sleeper issues" and unintended consequences that can arise in practice; and • Practical examples and case studies that illustrate common challenges and planning opportunities.

Technical program

Day 1 Thursday, 11 March 2027 continued

Time *AWST	Session	
12:00 – 1:00pm	**Lunch and Annual Meeting of the State**	
1:00 – 2:00pm	**Session 4A: Valuations Under the Spotlight – When You Need One and the ATO Approach** **Speakers: Jessica Brass, Grant Thornton, Rob Thompson, Australian Taxation Office, Nadine Marke, RSM Australia** **Facilitator: Simeran Cheema, CTA, SEER Financial Group** Valuations have moved to the centre of tax practice. The CGT changes require market values for assets held at 30 June 2027, and restructures prompted by the minimum tax on discretionary trusts will turn on supportable values. This panel brings together an ATO representative, a valuation specialist and a tax adviser to give practitioners a practical view of when a valuation is needed and what the ATO expects to see. Key discussion points include: • When a formal valuation is required, and when a reasonably arrived-at market value may be defensible without one • The ATO's approach to market valuations, including its guidance, the qualifications and independence it expects of valuers, and how it reviews valuations • Valuing assets as at 30 June 2027 under the CGT changes, including pre-CGT assets and assets held in trusts • Valuations in restructures and related party dealings, and the interaction with state duty valuations • Common deficiencies in valuation reports, and how to brief a valuer and document the basis of a valuation; and • Advising clients on cost, timing and managing the risk of ATO review.	**Session 4B: Innovative Business CGT Concession** **Speaker: Mark Thompson, BDO** The proposed Innovative Business CGT Concession (IBCC) will introduce a 50% CGT discount for investments in qualifying innovative Australian businesses. Understanding who can access the concession, how qualifying investments are identified and how the rules operate throughout the life of an investment will be critical. This session will unpack the proposed regime and its practical implications, including: • Which businesses may qualify as innovative businesses and the key eligibility requirements • Which investors may be eligible to apply the IBCC discount • How the concession applies from investment through to an eventual exit • The registration and ongoing compliance requirements for qualifying IBCC companies • The interaction with other CGT concessions and incentives applying to innovative businesses and their investors • The implications of changes in a company's activities, ownership or structure over time; and • Practical considerations for advisers when planning investments, transactions and exits. With the regime still proposed, the session will also consider areas requiring particular attention as the legislation develops and what advisers should be thinking about now.

Technical program

Day 1 Thursday, 11 March 2027 continued

Time *AWST	Session
2:00 – 3:00pm	**Session 5A: Division 7A** **Speaker: Ross Forrester, CTA, Westcourt, Samantha Morrow, Westcourt** The High Court's decision in *Bendel* has significantly altered the Division 7A treatment of unpaid present entitlements (UPEs), but it has not removed Division 7A risk from trust distributions to corporate beneficiaries. This session will examine what Bendel resolved, what remains exposed under Subdivision EA, and how the decision affects existing UPEs, complying loan arrangements and the future use of corporate beneficiaries. This session will also include any Division 7A changes if released between now and March 2027.
	Session 5B: The Future of Super Guarantee and The Rise of the Director Penalty Notice **Speaker: Billy-Jo Famlonga, FTI, Famlonga Business Services** The ATO is watching super more closely than ever, and the first sign may be a letter in your inbox. With more data, sophisticated data matching and greater visibility across payroll and superannuation systems, the ATO is taking a more proactive approach to identifying potential SG issues. Recent automated enquiry letters are giving practitioners an early glimpse of this new compliance approach. But what does the letter really mean, how should you respond, and what happens if the issue doesn't stop there? This session will explore: • The changing SG compliance landscape and what it means for employers, directors and their advisers; • Responding to the ATO's initial enquiries, including what practitioners should consider before responding; • When an enquiry may escalate into an audit, SGC assessment or further compliance action; • The potential consequences for directors, including exposure to Director Penalty Notices and personal liability; • What the ATO is looking for and where SG compliance is heading; and • How practitioners can stay ahead of the curve, helping clients identify and address potential SG issues before they escalate.



Technical program

Day 1 Thursday, 11 March 2027 continued

Time *AWST	Session
3:00 – 3:30pm	**Afternoon tea**
3:30 – 4:30pm	**Session 6: Private Group Restructures – Before the Rules Change** **Speaker: Gaurav Chitnis, CTA, HLB Mann Judd** Changes to the taxation of trusts and CGT may cause private groups to reconsider whether businesses and assets should continue to be held through discretionary trusts. This session examines the options for restructuring out of a discretionary trust, including existing restructuring methods and the new rollover. The session will compare the existing and new restructuring pathways, their limitations and the circumstances in which each may be used, including relevant duty considerations.
4:30 – 5:00pm	**Session 7: Keynote Address** Hear first-hand from a key and influential decision-maker.
5:00 – 5:30pm	**Bonus Session – The Next Generation: No Filter** **Facilitator: Annette Morgan, CTA, Curtin University** Hear directly from the next generation of tax professionals in this candid Q&A session exploring what attracts emerging talent to the profession, what they value most in their careers, and how firms and workplaces can better support, develop and retain future practitioners.



Networking function

Take in the views of the Swan River and join your colleagues and the forum speakers for networking drinks.

Date: Thursday, 11 March 2027
Time: From 5:30pm
Venue: DoubleTree by Hilton Perth Waterfront
Price: Inclusive for all full registration delegates
$80 for additional tickets – see registration form for details
Dress: Business casual

Technical program

Day 2 Friday, 12 March 2027

Time *AWST	Session
9:00–10:00am	**Session 8: Walter Gianotti Memorial Address – ATO Disputes** **Speaker: Matthew Sunits, MPH Lawyers** The Walter Gianotti Memorial Address honours Walter's legacy of professionalism, warmth, wit and his enduring commitment to positive relationships between the ATO and the tax profession. Each year, the address provides a platform for thoughtful discussion on issues affecting the tax system, while fostering constructive engagement between tax administrators, advisers and taxpayers. This year the address will focus on ATO disputes, exploring emerging priorities, challenges and opportunities for engagement between the ATO, taxpayers and advisers.
10:00–11:00am	**Session 9: Discretionary Trusts – Where Are We Now and Beyond?** **Speaker: Daniel Smedley, CTA, Sladen Legal** Discretionary trusts face heightened scrutiny as family wealth increasingly transitions to the next generation. With the ATO intensifying compliance activity on the use of trusts, and a minimum tax on discretionary trusts due to commence on 1 July 2028, this session examines current risk areas, the new regime, the implications for estate and succession planning, and the path ahead. Key discussion points include: • The ATO's current compliance approach to discretionary trusts, including recent case law, present entitlement, the validity of distributions and unpaid present entitlements owed to corporate beneficiaries, and the areas likely to remain in focus once the new regime commences • How the minimum tax on discretionary trusts will apply from 1 July 2028, including its calculation, interaction with the CGT changes, impact on streaming, franking credits and corporate beneficiaries, and reporting requirements • What the new regime means for estate and succession planning, including the scope of the testamentary trust exclusion and why it is narrower than it first appeared • Practical considerations where a client wishes to restructure, including the terms of the deed, trustee duties, duty implications and the impact on existing beneficial entitlements; and • Navigating continuing uncertainty as further legislative reform remains possible.
11:00–11:30am	**Morning tea**

Technical program

Day 2 Friday, 12 March 2027 continued

Time *AWST	Session	
11:30am–12:30pm	**Session 10A: Transfer Duty Traps and Cautionary Tales** **Speaker: Dr Jared Clements, Francis Burt Chambers** Transfer duty problems have an unfortunate habit of emerging after documents have been signed, transactions implemented and options narrowed. This session will look at the traps for clients and their advisers that can result in unexpected and unwanted duty consequences. Through practical scenarios and cautionary tales, it will explore how duty issues arise and the warning signs that should prompt a closer look. The focus will be practical – spotting the risk early, asking better questions and avoiding the kinds of surprises no client wants to receive.	**Session 10B: AML/CTF in Practice – Designated Services, Due Diligence and Trusts** **Speaker: Craig Gregory, SEER Financial Group** Since 1 July 2026, accountants, lawyers and other professionals who provide designated services have been regulated under the AML/CTF regime. Many firms providing designated services have yet to enrol, and AUSTRAC has moved quickly to compliance action. This practical session takes a deep dive into the obligations practitioners now face, with a focus on discretionary trusts. Key discussion points include: • What is a designated service, and how to assess whether everyday advisory, structuring and trust work falls within the regime • Customer due diligence (CDD) for new clients, and when CDD obligations are triggered for existing clients • CDD for discretionary trusts, including whose identity must be verified: trustees, beneficiaries, settlors, appointors and beneficial owners • Existing trusts compared with newly established trusts, including where the settlor cannot be located or has died, or the appointor is a former accountant or adviser • Understanding the reporting process and ongoing obligations; and • The consequences of providing designated services without enrolling, and the steps firms that have not enrolled should take now.



Technical program

Day 2 Friday, 12 March 2027 continued

Time *AWST	Session
12:30 – 1:15pm	**Lunch**
1:15 – 2:15pm	**Session 11: AI in Tax – Can We Have Our Cake and Eat It Too?** **Panellists: Daniel Taborsky, CTA, Birchstone Legal, Craig Seddon, CTA, Westcourt, Rob Thompson, Australian Taxation Office** **Facilitator: Billy-Jo Famlonga, FTI, Famlonga Business Services** AI is transforming the way tax professionals research, analyse and deliver advice, but can we really have all the benefits without compromising the things that matter most? This interactive panel will explore the opportunities and challenges of using AI in tax practice, from relying on AI-generated analysis and navigating confidentiality and privilege, to checking accuracy, exercising professional judgement and taking responsibility for the advice ultimately provided. Bringing together lawyers and accountants, the panel will tackle real-world scenarios and ask the difficult questions: when should we trust AI, when should we question it, and where should we draw the line?
2:15 – 3:15pm	**Session 12: Excluded Election Trusts – A Deep Dive** **Speaker: Tracey Dunn, Birchstone Legal** The excluded election trust (EET) regime offers discretionary trusts a path outside the minimum tax without restructuring, at the cost of flexibility. With a single election window and limited scope to unwind, the decision to elect demands careful analysis. This session will cover: • When an EET election may be appropriate, including eligibility, timing and potential state duty implications • Nominating beneficiaries, including the meaning of eligible company and the requirement that its members have no material discretionary elements • Trustee duties, including real and genuine consideration of beneficiaries' interests • Revocation, and the practical limits of the variation exceptions on a nominated beneficiary's death or relationship breakdown • Interaction with estate and succession planning and family law proceedings • Lessons from family trust elections (FTEs) and interposed entity elections (IEEs), including current issues with invalid elections; and • Practical steps before a trustee makes an EET election.
3:15 – 3:30pm	**Afternoon tea**

Technical program

Day 2 Friday, 12 March 2027 continued

Time *AWST	Session
3:30 – 4:30pm	**Session 13: The Tax Profession Unplugged – The Issues, Risks and Opportunities Shaping Our Future** **Panellists: Gaurav Chitnis, CTA, HLB Mann Judd, Matthew Sunits, MPH Lawyers** The tax profession is facing unprecedented change. Practitioners have had to absorb one of the most wide-ranging Federal Budgets in recent history, the landmark decision in *Bendel* and expanded regulatory powers for the Tax Practitioners Board. At the same time, the rise of AI, new lines of ATO compliance activity on historical issues such as family trust distribution tax, and the ongoing challenge of attracting and retaining talent are testing senior tax professionals and practice owners alike. This panel summarises the legislative and regulatory changes affecting the profession. It offers practical guidance on managing the risks they bring, and frank commentary on how practitioners can not only withstand the current period of flux but thrive in it. Key discussion points include: • The legislative and Budget measures reshaping advice to private clients, and the practical fallout from *Bendel* • The TPB's expanded powers, and what they mean for practitioner obligations, governance and professional conduct • Emerging ATO compliance activity on historical issues, including family trust distribution tax, and how to manage client exposure • Using AI in practice: the opportunities, the risks and the professional responsibilities that come with it; and • Attracting, developing, and keeping talent in a changing profession.



Presenters

Simeran Cheema, CTA, works in all areas of taxation advisory. Her specialty is in taxation consulting and she has advised many clients on a range of taxation matters over the last 15 years. In particular, Simeran has provided extensive advice for high net worth individuals and businesses in the SME space as well as large corporates. Simeran has significant experience in the areas of tax consolidations, restructures and the small business concessions. Simeran has a Bachelor of Laws, Bachelor of Commerce and a Masters in Taxation and was admitted as a lawyer in the Supreme Court of Western Australia in October 2008.

Gaurav Chitnis, CTA, is a Partner at HLB Mann Judd and a tax specialist with more than 20 years' experience advising private and corporate clients on complex taxation matters. He is a Chartered Accountant, CPA, Chartered Tax Adviser, and a lawyer admitted to the Supreme Court of Western Australia. Gaurav advises on a broad range of income tax matters, with expertise in CGT, Division 7A, business restructures, taxation of trusts and tax residency. He also regularly assists clients with ATO reviews, audits, and tax disputes. Gaurav is a WA State Councillor of The Tax Institute and an advisory member of the ATO Private Groups Stewardship Group.

He regularly presents and writes on tax issues and teaches in the Master of Taxation program at Curtin Law School.

Dr Jared Clements is a specialist tax barrister at Francis Burt Chambers, with 18 years' experience across top-tier law firms and academia. Before joining the Bar, Jared spent more than a decade as an academic at the UWA Law School, teaching taxation, mining and petroleum law in the JD, LLM and MTax programs. He also practised as a lawyer at Ashurst, Allens Arthur Robinson and PwC. Jared's practice spans the full breadth of Australian taxation. He has a special interest in mining, petroleum and infrastructure transactions—the topic of his doctoral research. He also advises private clients, high-net-worth individuals and family groups on their tax affairs. Jared is the author of the taxation of trusts and partnerships chapters in Principles of Taxation Law (Thomson Reuters, 2026), a leading text used in law schools across Australia. He has also published extensively in peer-reviewed Australian law journals. Jared holds a Doctor of Philosophy in Law from the University of Western Australia. He also holds a Bachelor of Laws with First Class Honours and a Bachelor of Commerce in Accounting from Murdoch University, where he received the Vice-Chancellor's Commendation for Academic Excellence. Jared is a Fellow of The Tax Institute and sits on the WA State Council, as well as the State Taxes Committee.

Tracey Dunn is Associate Director at Birchstone Legal Group. 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.

Billy-Jo Famlonga, FTI, Founder and Principal, Famlonga Business Services. Billy-Jo Famlonga is the founder and principal of Famlonga Business Services, a practice built around helping SME clients navigate tax and grow with confidence. Drawing on 20 years in the industry, Billy works closely with businesses on tax compliance, structuring and succession planning, and also advises not-for-profit organisations. Billy specialises in audit and dispute matters and forensic accounting. She guides clients through reviews and investigations and helps them get to the bottom of complex financial issues. She also brings a strong focus on business technology and process automation, helping clients modernise the way they work. Her client base spans primary production, freight and logistics, digital assets, retail and the NDIS sector, giving her a practical, real-world view of the issues facing WA businesses. Billy holds a Graduate Diploma of Applied Tax Law and is a Fellow of both The Tax Institute and the Institute of Public Accountants. She is Chair of The Tax Institute's WA State Council and is a strong advocate for the local tax community. She is actively involved in WA's Women in Tax, Emerging Leaders and Local Engagement working groups.

Ross Forrester, CTA, is the founder of Westcourt Family Business Advisors who assist families manage their business assets both in Australia and abroad. He currently sits on The Tax Institute's National SME Tax Technical Committee and is the former Chair of The WA State Council for The Tax Institute. Ross is also the South East Asian Chair for Geneva Group International's Tax Practice Group.

Presenters

Karen Goodfellow, CTA, is the owner and principal of Goodfellow Tax Advisory Pty Ltd, providing specialist tax consulting services and training to accountants, lawyers and other advisors to SMEs and family groups. She is an experienced tax professional with extensive experience in the tax advising and education (CPD/CPE) space. As the founder and operator of two successful tax training businesses, Karen has detailed knowledge of Australia's federal tax system. Karen's extensive experience providing tax advice and training gives her an excellent understanding of the most pressing issues facing tax practitioners such as CGT roll-overs, the small business CGT concessions, the CGT main residence exemption, taxation of trusts and taxation of companies.

Craig Gregory has over 25 years' experience across professional investigations, risk management and compliance auditing. Craig also boasts extensive experience with forensic data analytics and its application to complex fraud and corruption investigations, risk management, payment integrity and quality auditing. Craig's experience has seen him work across an array of markets including health insurance, commercial insurance (financial lines), aviation, maritime, mining and government. Craig was previously a Senior Executive with Medibank Private Limited, has held senior roles in government and was a decorated police detective. Craig is a Director with Innovate Australia and sits on the National Executive of the Australian Crime Prevention Council. He holds an MBA from the University of New South Wales and a Degree in Social Science in Policing from Edith Cowan University.

Annette Morgan, CTA, is an accomplished academic and professional tax practitioner with over 30 years of experience in taxation. She is the Discipline Lead of Taxation and the Director of the Industry and Community Engagement Hub at Curtin University, where she also founded the nationally recognised Curtin Tax Clinic. Annette is a member of the Australian Taxation Office Tax Practitioners Stewardship Group and serves on several committees within the Tax Institute, contributing to national discussions on tax policy, education, and professional standards. She is also a government appointed member of the WA Legal Cost Committee. Her work spans clinical education, financial literacy, and innovative teaching, and she has received multiple awards for her contributions to the profession and the community.

Nadine Marke is a Partner and National Head of Corporate Finance at RSM Australia, leading a team of more than 100 mid-market corporate finance professionals. She is an accredited Business Valuation Specialist with Chartered Accountants Australia and New Zealand and has over 20 years experience advising private businesses, listed companies and professional advisers on valuation matters. Nadine specialises in business, equity and intangible asset valuations for taxation, transactions, restructures, financial reporting and disputes, and has appeared as an Expert Witness in multiple jurisdictions.

Daniel McInerney KC, CTA, is one of Australia's leading taxation barristers. Since being called to the Bar in 2007 he has appeared in many significant tax cases and is regularly called upon for his advice on complex tax issues by taxpayers and the Australian Taxation Office.

Leo Prendeville is a Senior Economist at the CCIWA with a background spanning economics, strategy, AI and data, and construction. His work focuses on helping businesses and decision-makers understand the economic, industry, and geopolitical forces shaping Western Australia. Prior to joining CCIWA, Leo worked in consulting at Deloitte across projects spanning government and industry. Earlier in his career, he worked in construction and became a trade-qualified carpenter. His areas of interest include Western Australian economic development, AI and technology, business strategy, productivity, housing and construction, market analysis, and the impact of geopolitical trends. He holds a Bachelor of Commerce majoring in Economics and a Graduate Certificate in Data Science.

Craig Seddon, CTA, joined Westcourt Family Business Accountants as a graduate in 2000 and has been a Director since 2009. Craig is a Fellow of the Institute of Chartered Accountants Australia and New Zealand. Craig has assisted many family businesses with their tax compliance and tax advisory requirements, including the purchase or sale of their business as well as any restructuring requirements. Craig believes that being a family's accountant is more than dealing with "a set of numbers", it is about "helping a family get the most out of their life" and understanding what is important to them. Craig is passionate about using technology to provide efficiencies within a business, so the owners and key staff can maximise their time in generating income and growing the business. Outside of Westcourt, Craig is a voluntary director of the Bendigo Community Bank Ellenbrook-Bullsbrook and Bindoon branches.

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.

Matthew Sunits is an experienced taxation lawyer with over 10 years' experience in taxation law. Matthew advises accountants, businesses, high-net-worth individuals and other lawyers on a range of taxation matters. Matthew has also had the benefit of working on a large range of disputes both for and against revenue offices. This not only gives Matthew a unique insight into revenue disputes but also allows him to advise and assist his front-end clients in a way that appropriately balances their risks. Prior to joining MPH, Matthew worked at boutique law firms, a multinational accounting firm and for the Australian Government Solicitor where he acted for the Commissioner of Taxation. Matthew holds a Bachelor of Laws and Economics and is a member of the Law Society of Western Australia.

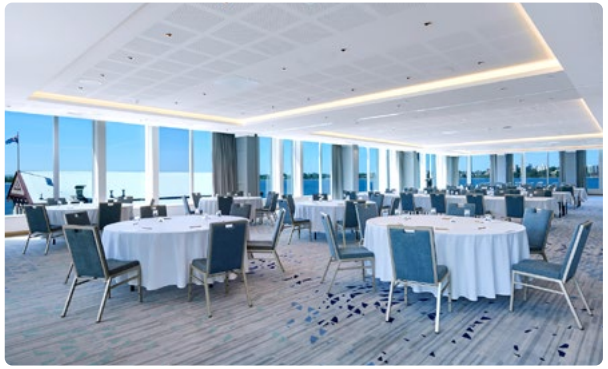
Daniel Taborsky, CTA, is the managing director and founder of Birchstone Legal Group. He is a tax specialist and has been recognised as a leading tax lawyer by Doyle's Guide since 2020. He specialises in resolving tax disputes for high net worth individuals and private groups. Daniel advises on complex tax matters (with a particular interest in Division 7A), asset protection and estate/succession planning strategies and philanthropic ventures. Daniel works closely with family lawyers in complex financial matters. Daniel also advises not-for-profit entities, including charities, on structuring and tax issues. Daniel regularly presents and writes articles on tax issues for leading professional bodies.

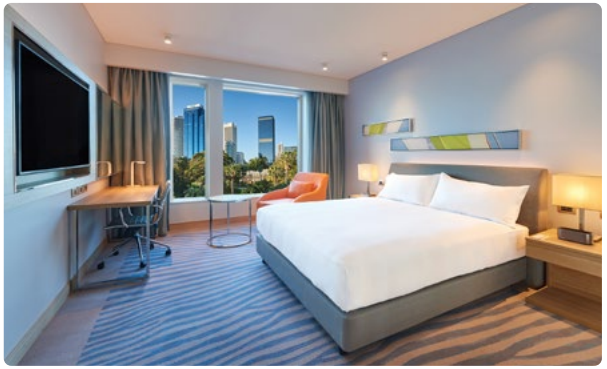
Mark Thompson is a specialist in R&D and Government Incentives with BDO in Perth, bringing two decades of experience helping organisations across jurisdictions and industries, from start-ups to multinationals, to obtain government incentives. In addition to Australia, his experience spans international markets including New Zealand and Singapore, where he has established himself as an expert at identifying opportunities and supporting businesses to access government incentives, including tax benefits and non-dilutive funding. Mark also has a computer science background and deep knowledge of software R&D across industries. Mark combines technical rigour with a pragmatic, audit-ready approach, drawing on extensive experience to work through complex government incentive requirements and optimise the scope, preparation and substantiation of audit ready government incentive claims. Client value is at the core of Mark's service offering, and he has significant experience in navigating regulator reviews and working closely with clients to maximise incentive benefits while minimising administrative burden. Mark partners with clients across a number of sectors including technology, media and telecommunications, natural resources and energy, manufacturing, life sciences, food and agribusiness, and financial services. His core focus is supporting clients across R&D tax incentives and state and federal government grant and incentive programmes.

Rob Thomson is the Assistant Commissioner for Government, Experience and Tailored Support – Individuals and Intermediaries and is leading the ATO Vulnerability Capability. For the last two years, Rob represented the ATO as the official Tax Time spokesperson. An experienced tax professional with over 10 years experience, Rob spent time as Minister Counsel (Taxation) at Australia's Permanent Delegation to the Organisation for Economic Co-operation and Development (OECD) in Paris and he has extensive experience across several diverse roles in the ATO. Starting at the ATO as a Post Grad in High Wealth Individuals, Rob progressed to a compliance officer role, then worked his way into specialist taskforces, policy implementation and strategic programs. Rob holds a Masters of International Taxation and a Bachelor of Commerce (B.Com). Prior to joining the ATO, Rob worked in a managerial role for a not-for-profit foundation in New York.

Venue and accommodation







DoubleTree by Hilton Perth Waterfront

1 Barrack Square, Perth WA 6000

Set on the quayside along the Swan River, this polished hotel is an 8-minute walk from Elizabeth Quay train station and a minute's walk from The Bell Tower, which has a set of 18th-century bells. The hotel is 2 kilometres from Kings Park and Botanic Garden.

Getting there

DoubleTree by Hilton Perth Waterfront is a 25-minute drive from Perth Airport, and is situated directly on Elizabeth Quay with the Perth CBD just a short walk away.

Transperth trains operate regularly between Perth Airport T1/T2 and Elizabeth Quay Station via the Airport Line. Alternatively, commuters on the Joondalup Line can travel directly from northern hubs to Elizabeth Quay Station, located a flat 3-minute walk (250 metres) from the hotel.

While on-site parking is unavailable at the property, secure public parking is accessible within a short walking distance at the City of Perth Parking (CPP) Elizabeth Quay or CPP Terrace Road car parks.

Parking

Valet parking is not available at this property. Alternatively, secure public self-parking is available nearby at the CPP Elizabeth Quay or Terrace Road car parks.

Accommodation

Favourable room rates have been negotiated and secured at DoubleTree by Hilton Perth Waterfront. Accommodation bookings can be made by clicking here.

Please note booking conditions with the hotel when booking. All additional hotel incidentals, including breakfast, remain the responsibility of delegates, and individuals will be responsible for payment of the balance of their account when checking out of the hotel. Please note that extra charges may be incurred for additional guests and will be charged to individual room accounts upon checkout.

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 13 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.

Dress code

Business or business casual attire is suitable for the duration of the conference.

Special dietary and accessibility requirements

Please indicate any special dietary requirements at the time of registration. Please email us with any accessibility requirements at nationalevents@taxinstitute.com.au.

Networking function

A networking function will be held directly following the last session on Thursday from 5:30pm. The networking function is included in the conference registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of $80. Please indicate your requirements, including dietary requirements, at the time of registration.

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control, including "an act of god", "pandemic", "health-related event" or "government requirements", we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

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.

The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

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.

For registration enquiries, please contact customeradmin@taxinstitute.com.au.

LPBWA CPD points

The Tax Institute is an accredited QA provider and CPD points earned at this event are recognised by the Legal Practice Board of Western Australia (LPBWA).

CPD category: Substantive Law – 9.0 – 10.0 hours* | Ethics and Professional Responsibility – 0.5 hours | Practice Management and Business Skills – 2.5 – 3.5 hours*.

*Allocation will vary pending breakout session attendance

Registration

Registration inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ forum lunches	Forum networking function*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Employer registration This registration option allows one registration to be shared between multiple attendees from the same firm.	✓		

*Additional tickets to the networking function can be purchased on the registration form.

Discounts

Early bird registration

All registrations received and paid on or before Friday 12 February will be entitled to an early bird discount.

Please note: The registration fee does not include accommodation, hotel incidentals or transfers.

Group discounts

Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth 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.

Register now!

Register online ▶

Register via form ▶
included in this brochure



The Tax Institute

WA Tax Forum
Registration form

45309 | WD

A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain the 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 17 for registration inclusions.

Full registration – 13 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before 12 February 2027	☐ $1,695	☐ Event Member Rate plus pro rata* Affiliate membership until 30 June 2027. (*Approx $53 per month)	☐ $1,995
Standard registration Register after 12 February 2027	☐ $1,895		☐ $2,195

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

Networking function

The networking function is INCLUDED in the registration fee for delegates attending the full conference.

Thursday 11 March at the DoubleTree by Hilton Perth Waterfront

☐ Yes, I WILL be attending the networking function OR

☐ No, I WILL NOT be attending the networking function

☐ Yes, I require additional tickets for the networking function at $80 per person

No. _____ x tickets at $80 each: $ _____

Dietary requirements:

_____

***Become a member and save!**

Not a member of The Tax Institute yet? Sign up for membership until 30 June along with your event registration and:

- Save $300 of your event registration
- Access other member-only discounts in the future
- Access all member-only technical resources.

Find out more about membership at taxinstitute.com.au/membership.

JOIN TODAY

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 Breakout session options

Please tick the breakout sessions you would like to attend during the conference:

Day One – Thursday 11 March 2027

1:00–2:00pm
- ☐ Session 4A: Valuations Under the Spotlight – When You Need One and the ATO Approach
- ☐ Session 4B: Innovative Business CGT Concessions

2:00–3:00pm
- ☐ Session 5A: Division 7A
- ☐ Session 5B: The Future of Super Guarantee and The Rise of the Director Penalty Notice

Day Two – Friday 12 March 2027

11:30am–12:30pm
- ☐ Session 10A: Transfer Duty Traps and Cautionary Tales
- ☐ Session 10B: AML/CTF in Practice – Designated Services, Due Diligence and Trusts

26-005EVT_11/26

4 Payment summary

Registration fees	$
Additional guest tickets – Networking function ($80 each)	$
Total payable	$

5 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: MM/YY

Cardholder's signature:

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

For event enquiries, please contact the National Events Team on **1300 829 338** or nationalevents@taxinstitute.com.au.

For registration enquiries, please contact customeradmin@taxinstitute.com.au.

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. [You can also request TTI's consultants to provide you with a copy of TTI's 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 **Mail** Level 21, 60 Margaret Street, Sydney NSW 2000 **Online** taxinstitute.com.au

The Tax Institute

WA Tax Forum Employer Ticket
Registration Form

45309 | WD

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 Employer Ticket types

Employer tickets offer a flexible option for employers to send multiple attendees to an event. We have different options to suit you and your team.

	Classic	Plus	Premium	Tailored
Early bird on or before Friday, 12 February	$3,450	$4,950	$6,450	
Standard after Friday, 12 February	$3,650	$5,150	$6,650	
Best for	SME	Mid-Tier	Corporate	Large/National
Flexibility	Your choice of 20 sessions	Your choice of 40 sessions	Your choice of 60 sessions	Contact us to tailor a quote today for you and your team to attend multiple events.
Team attendance	Up to 5 attendees	Up to 10 attendees	Up to 15 attendees	
Session formats	Face-to-face	Face-to-face	Face-to-face	
Networking	2 networking passes	5 networking passes	10 networking passes	

All Employer Ticket attendees receive:
- Electronic access to download available technical papers and presentations
- Morning tea, lunch and afternoon tea
- CPD hours allocated according to attendee — 1 hour session = 1 CPD hour per attendee

Session selection
- Coordinators will be contacted with a session selection form to complete on behalf of attendees, based on the Employer Ticket type selected.
- The session selection form must be completed in full to ensure proper allocation of CPD hours post-event.

1 Employer Ticket types

Promotional code:

Ticket type	Cost	No. of tickets	Sub-total
☐ Classic			
☐ Plus			
☐ Premium			
		Total payable $	

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 ☐ Diners

Name on card:

Card no.: Expiry date: MM/YY

Cardholder's signature:

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

The Tax Institute

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