

# Next Generation Tax Convention

26 – 27 November 2024

The Calile  
Brisbane

8 CPD hours



# Dare to be tax passionate

The world of tax is changing – will you be swept along in the current, or help chart the course?

Whether you're entering the workforce or transitioning to a tax specialty, immerse yourself in leading tax topics from fundamental subjects to emerging challenges that will need to be solved by this new cohort of practitioners. Plus, meet and connect with the other passionate professionals who will be your peers throughout your career journey.

Guided by experts and surrounded by like-minded peers, the Next Generation Tax Convention is the perfect place to find out what it truly means to have a career in tax.



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

John Ioannou, CTA, Chair, Convention Organising Committee

Adria Askin, McCullough Robertson

Kim Barnes, McInnes Wilson Lawyers

Emma Carr, Macpherson Kelley

Stephanie Chard, Griffith University

Chris Pedler, HLB Mann Judd

Natasha Wilson, Vincents



# Welcome



**John Ioannou, CTA**  
Chair, Convention Organising Committee

A program designed by emerging leaders for emerging leaders and tax professionals who want to be at the forefront of what the future of the tax industry looks like.

The Next Generation Tax Convention is the first event of its kind on The Tax Institute's Events Calendar, with sessions covering a range of topical, ethical and technical content designed by a committee of young practitioners paving the way for the future.

Join our expert presenters as we navigate through the issues at the centre of a future tax practitioners world and learn more about the resources and support available to all tax professionals.

Whether you're on day 1 or day 100 of your tax journey, the Next Generation Tax Convention has something for you.

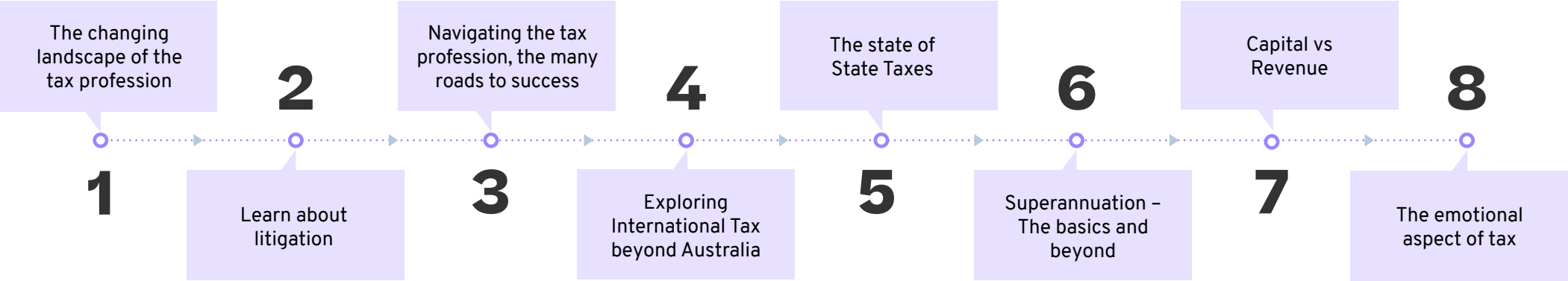
**“Do what you love and success will follow. Passion is the fuel behind a successful career.”**

Meghan Biro, Founder and CEO of TalentCulture,  
Author and motivational speaker



# About the program

Eight interactive sessions featuring leading tax experts sharing insights and experiences on key issues for the future tax practitioner.



# An inspiring event for emerging leaders in tax, accounting and law

Join us

Emerging leaders at the beginning of their tax journey.

Seasoned practitioners who want to know what to expect in tomorrow's tax landscape.

Passionate professionals who love what they do

# Our speakers



**Julie Abdalla, FTI**  
The Tax Institute

Julie Abdalla, FTI, is the Senior Counsel – Tax & Legal at The Tax Institute. Julie has practiced in the corporate tax teams of Big 4 and top tier law firms in Sydney and Melbourne. She has expertise in law and policy across a broad range of taxes and industry sectors. Prior to joining The Tax Institute, Julie gained experience across the spectrum of UK taxes while working at an international law firm in London. Julie is driven to achieve holistic tax reform, and has the depth of knowledge to advocate for members and the betterment of the tax system. Julie represents The Tax Institutes in several external forums including the ATO's National Tax Liaison Group and the Australian Treasury's Tax Treaty Advisory Panel, and has appeared as an expert witness in several Senate Committee inquiries. Julie has been recognised throughout the profession for her leadership and excellence in tax.



**Erin Beard**  
Deloitte

Erin Beard is a Manager in the Business Tax Services team at Deloitte, with 4 years' experience in corporate and international tax matters. Erin primarily works with large corporates and multinationals operating in the Consumer and Energy & Resource industries on a variety of matters, including tax compliance, tax structuring, post-merger integration services, ATO reviews and international tax issues.



**Natalie Cameron**

Natalie Cameron is an accomplished lawyer and Chartered Tax Adviser with eight years of expertise in taxation and private advisory services tailored for small business owners and high-net-worth individuals. Diligent, dedicated, and strategic in her approach, Natalie's practice revolves around key areas such as taxation, structuring, asset protection, succession planning, and mergers & acquisitions.



**David Hughes, CTA,**  
McCullough Robertson

David Hughes, CTA, is a Partner at McCullough Robertson and a Queensland Law Society Accredited Specialist in taxation law. David acts for clients throughout Australia and offshore in relation to navigating cross-border taxation issues, including structuring advice and taxation disputes with the ATO, including audits, objections and running appeals in the High Court, Federal Court and the Administrative Appeals Tribunal against excessive tax assessments. David has also taken court action to prevent the ATO from taking illegal enforcement action, including successfully overturning departure prohibition orders.

# Speaker profiles continued



**John Ioannou, CTA**

Macpherson Kelley

John Ioannou, CTA, was admitted as a Solicitor in 2002, is a Principal Lawyer at Macpherson Kelley and leads the national tax practice. He has experience in the areas of tax structuring, tax disputes and commercial transactions. John has a Bachelor of Arts, Bachelor of Laws and a Masters of Law.



**Harry Lakis, CTA**

QLD Bar

Harry Lakis, CTA was admitted to the Queensland Bar after 23 years' experience as a solicitor and tax partner in national law firms. At the Bar he continues to practise in revenue law, with a particular focus on transactional taxes. He has experience in all federal taxes including GST and CGT, and in duties, taxes and levies across all Australian state jurisdictions. Harry is briefed by taxpayers and revenue authorities, and has acted and advised on business structures, trusts and finance – in the context of transaction planning as well as mediation and contested disputes.



**Katherine Patel**

HLB Mann Judd

Katherine Patel, FTI is a partner at HLB Mann Judd in the Business Advisory and Tax Division. She predominantly works alongside large family businesses both and on and offshore in the manufacturing and property sector, to provide solutions to complex tax and business issues. Katherine provides strategic advice and practical solution, dependent on the stage of the business lifecycle, including business growth and expansion options, constant assessment of structural considerations which are subject to growth and acquisitions, exit options including maximizing profit and managing tax on sale, next generation business succession planning and advice.



**Kim Reynolds, CTA**

Vincents

Kim Reynolds, CTA, is a Chartered Accountant, Chartered Tax Adviser and Director at Vincents. Kim has over 25 years' experience working with SME's, family groups and high net worth individuals helping them navigate tax issues impacting on their affairs. Kim's expertise includes complex income tax and CGT issues including Division 7A and CGT Small Business Concessions, taxation of trusts, succession and estate planning, and transaction advice and support. Kim is a Vice-Chair of The Tax Institute's Queensland State Council.



# Speaker profiles continued



**Jodie Robinson, CTA**  
McCullough Robertson

Jodie Robinson, CTA is an Accredited Tax Law Specialist and Special Counsel in the tax team with McCullough Robertson Lawyers. Jodie is passionate about providing clients with results-driven, commercial advice and solutions for their taxation and business needs. Jodie regularly advises on the tax consequences of the sale of significant businesses, business restructures, including applicable rollovers and duty exemptions, and holding company interpositions. Jodie also assists clients and their advisors in obtaining private binding rulings and dealing with payroll tax self-review audits.



**Tom Walrut, FTI**  
Cooper Grace Ward Lawyers

Tom Walrut, FTI is a Senior Associate at Cooper Grace Ward Lawyers experienced in providing tax advice to clients on both State and Federal tax issues. Tom primarily works with SME clients in a broad range of industries advising on tax planning, transactional matters, structuring and general commercial matters. He also regularly acts for clients in taxation objections and disputes with both State and Federal Revenue Authorities.



**Mailene Wheeler**  
Vincents

Mailene Wheeler is a Director in Superannuation Advisory and specialises in all aspects of Self-Managed Superannuation Funds (SMSFs). Her expertise includes taxation and administration of SMSFs, retirement planning, estate and succession planning, contribution strategies, limited recourse borrowing arrangements and reviewing investment structures to ensure legislative compliance. As a superannuation specialist, Mailene focuses her expertise into empowering people to take control of their super. She does this by working closely with not only her clients, but also their tax and/or financial advisers. Mailene not only works for her clients but educates them to be more involved in their own superannuation story. She takes the approach that there is never a dumb question when it comes to your super.

# Program

**Day 1** Tuesday, 26 November 2024

Time	Session	Speakers
12:00pm – 12:55pm	Registration and light lunch on arrival	
	Welcome and Opening address	
1:00pm – 2:00pm	<b>Session 1: The new tax landscape – The winds are changing</b> The tax landscape is constantly undergoing significant transformation, particularly as regulatory requirements evolve and technology advances rapidly. During this session we will hear from the ATO on how we can expect these changing winds to influence tomorrow’s tax professionals. We will explore: <ul style="list-style-type: none"><li>– Changes in approach in dealing with the ATO</li><li>– Changes in approach with law</li><li>– Changes in ethical approach of professional guidelines</li><li>– Compliance approaches;</li><li>– ATO Data Matching; and</li><li>– Utilisation of AI.</li></ul>	ATO Representative To be confirmed
2:00pm – 3:00pm	<b>Session 2: Understanding the Complexities of Litigation and the Taxation Administration Act 1953 (Cth), We do not start fights, but they can finish them</b> Join our expert presenter, David Hughes, as he journey’s through everything litigation and the added complexities that the Tax Administration Act bring to this already complex area of tax. David will discuss: <ul style="list-style-type: none"><li>– Life cycle of a dispute, including what are hard vs soft deadlines and how to manage 353 notices</li><li>– Onus and burden of proof</li><li>– Penalties, interest, etc.</li><li>– Opinions and discretions; and</li><li>– What is reversable or reviewable?</li></ul>	David Hughes, CTA McCullough Robertson

# Program continued

**Day 1** Tuesday, 26 November 2024

Time	Session	Speakers
3:00pm – 3:30pm	Afternoon tea	
3:30pm – 5:00pm	<b>Session 3: Navigating the Tax Profession – The wilderness must be explored</b> Adventure is out there and the wilderness must be explored! Each journey is unique and with so many paths to be explored it's easy to see how a career in tax could be daunting. In this session you will hear from a panel of seasoned wilderness explorers about: <ul style="list-style-type: none"><li>– The tax journey</li><li>– How to navigate the profession</li><li>– Mentorship; and</li><li>– Jobs available.</li></ul>	<b>Facilitator</b> <b>John Ioannou, CTA</b> Macpherson Kelley <b>Panelists</b> <b>Harry Lakis, CTA</b> QLD Bar <b>Julie Abdalla, FTI</b> The Tax Institute <b>Jodie Robinson, CTA</b> McCullough Robertson
5.00pm – 7.00pm	Networking	



## Networking function

Join your colleagues and speakers for an evening of drinks, canapes and networking.

**Date:** Tuesday 26 November

**Time:** 5.00 – 7.00pm

**Venue:** The Calile Hotel

**Price:** Inclusive for all delegates  
\$80 each for additional tickets, available to purchase at registration

**Dress:** Business Casual

# Program continued

## Day 2

Wednesday, 27 November 2024

Time	Session	Speakers
9:00am – 9:45am	<b>Session 4: International Tax – A whole new world</b> Jump on the magic carpet and take a ride around the world as we explore key issues in international tax that impact all advisors, including: <ul style="list-style-type: none"><li>– Residency and prospective changes</li><li>– s99B; and</li><li>– CFC.</li></ul>	Erin Beard Deloitte
9:45am – 10:30am	<b>Session 5: State Duty Taxes, taxes, taxes, dutiful lovely taxes</b> This session aims to give an overview of the basic concepts of duty and stark differences between Queensland and other state and territories: <ul style="list-style-type: none"><li>– Concepts of duty in Queensland</li><li>– What is a dutiable transaction?<ul style="list-style-type: none"><li>– Transfer duty</li><li>– Landholder duty</li><li>– Existing and new rights in Queensland</li><li>– Acquisition of Qld business assets and the small business restructure relief (4 years on)</li><li>– Oliver Hume in NSW, Vic and its affects on trust acquisitions in Queensland; and</li></ul></li><li>– Other State Taxes Hot Topics</li></ul>	Tom Walrut, FTI Cooper Grace Ward Lawyers
10:30am – 11:00am	Morning tea	

# Program continued

## Day 2

Wednesday, 27 November 2024

Time	Session	Speakers
11:00am –12:00pm	<p><b>Session 6: Superannuation – Even miracles take a little time</b></p> <p>Our Superannuation Fairy Godmother, Mailene will discuss:</p> <ul style="list-style-type: none"><li>– Balance basics – transfer balance caps, total super balance caps</li><li>– Phases of superannuation – accumulation/retirement</li><li>– Dealing with related parties including:<ul style="list-style-type: none"><li>– Nali/NANE</li><li>– Recent TD – CGT</li><li>– In house assets:<ul style="list-style-type: none"><li>– Property development/related parties</li><li>– Issues</li><li>– Prohibitions</li></ul></li><li>– Div 7A; and</li><li>– Div 296.</li></ul></li></ul>	Mailene Wheeler Vincent
12:00pm – 1:00pm	<p><b>Session 7: Capital vs Revenue – A tale as old as time</b></p> <p>This session will dive into the tale as old as time of the complexities involved with capital, revenue, and profit-making undertakings. Our presenter will work through:</p> <ul style="list-style-type: none"><li>– The “basics” of the revenue vs capital divide</li><li>– Key cases (old and new)</li><li>– Primary considerations for property owners, investors and developers</li><li>– Primary considerations for shave investors and traders; and</li><li>– Practical examples of common client scenarios.</li></ul>	Natalie Cameron

# Program continued

## Day 2

Wednesday, 27 November 2024

Time	Session	Speakers
1:00pm – 2:00pm	Lunch	
2:00pm – 3:00pm	<p><b>Session 8: Dealing with emotional and vulnerable clients – When it goes wrong it goes wrong</b></p> <p>Life in the tax world is not always a Disney movie. What is not often discussed as a tax professional is the emotional side of tax and how to remain ethical and professional.</p> <ul style="list-style-type: none"><li>– Giving clients bad news</li><li>– How to “deal” with emotional clients</li><li>– Differences between emotional clients and vulnerable clients, approaches</li><li>– STD debt – dealing with the clients</li><li>– Policy initiatives to assist vulnerable persons</li><li>– Is our tax system accessible without/with representation? and</li><li>– Small business division of AAT – continuation..</li></ul>	<p><b>Melissa Belle Isle</b> Griffith Tax Clinic</p> <p><b>Facilitator:</b> <b>Kim Reynolds, CTA</b> Vincent's</p>
3:00pm	Convention Close, Afternoon tea and networking	

# Venue

## The Calile Hotel

48 James Street, Fortitude Valley, QLD, 4006

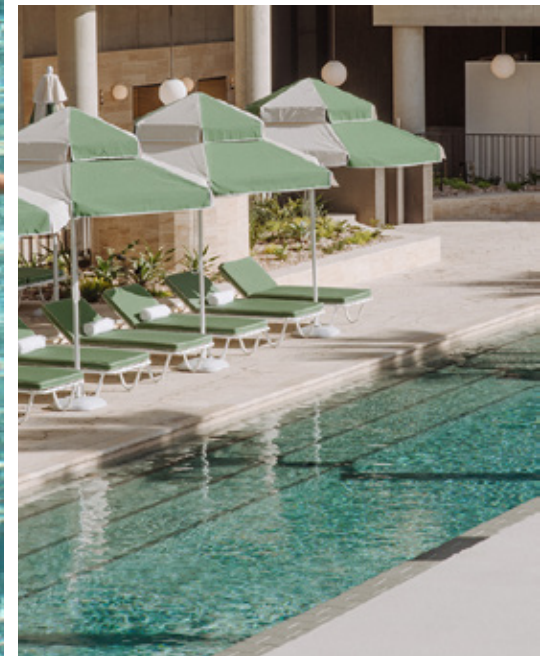
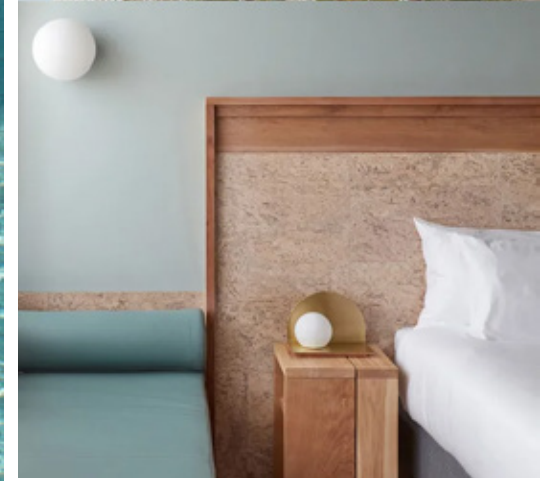
Located in the city of Brisbane, with direct access to restaurants, shopping and bars, The Calile Hotel features an outdoor pool, fitness centre and spa facilities. You can complete your Brisbane experience with visits to the city's art galleries, museums and the CBD, all within a short drive from the property.

Create memorable moments in time at The Calile Hotel. Enjoy the many facilities at the property, including the four on-site restaurants: Lobby Bar, Hellenika, SK Steak & Oyster and Sushi Room. Relax with a cocktail in a poolside cabana or at the hotel's spa facilities, which provide a holistic wellness experience with modern approaches to skin health, medical aesthetics and beauty essentials.

## Getting here

Located at 48 James Street, Fortitude Valley and is approximately a 20-minute drive from the Brisbane Airport. The hotel is located a short ten-minute walk from the Fortitude Valley Train Station and is directly adjacent of the James Street 8A bus stop.

The Calile Hotel has secure carparking available from 6:00am – 12:00am for \$25/day for guests or valet parking available for \$45 p/day.



# Event information

## Registration options and inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Convention lunches	Networking Function	How to register
<b>Full Congress Face-to-face registration</b> This registration option entitles one delegate to attend the entire event in-person.	✓✓✓	✓✓✓	✓✓✓	Register online or complete the form included in this brochure.

Please note: Registration fees do not include travel, accommodation, hotel breakfasts or hotel incidentals.

Register online at [taxinstitute.com.au](https://taxinstitute.com.au)

## Networking function | Wednesday, 26 November

The networking function is included in the registration fee for delegates attending the full conference. The networking function includes stand-up canapes and drinks. 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.

## Registration inclusions

Full event registration includes participation in the technical program, electronic access to all available materials via the Next Generation Tax Convention Attendee Hub, attendance at the networking function on Wednesday

evening and all refreshments during convention hours. Registration fees do not include travel, accommodation, or hotel incidentals.

## 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.

## Discounts

### Early bird registration

All registrations received and paid for on or before Friday 25 October 2024 will be entitled to an early bird discount.

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 National Events Team on 1300 733 842 or at [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

## Delegate list

A delegate list will be included on the Delegate Portal to assist with networking. Please indicate on the registration form if you do not want your name included on the list.

## Confirmation of registration

A confirmation letter and tax invoice will be sent via email (please note you will receive two separate emails).

## Continuing Professional Development (CPD)

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

## Dress code

Business or Business casual attire is suitable for the duration of the event and networking function.



### **Special dietary or accessibility requirements**

Please indicate any special dietary or accessibility requirements on the registration form.

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

If a registered delegate is unable to attend a face-to-face event as a result of interstate border closures or they reside in or visited a COVID-19 hotspot, we will endeavour to transition the registration to an online registration for the event. If there is a difference in price a credit will be provided to delegates to be used at a future event. If a delegate does not wish to transition their registration to the alternate online event, a full refund/credit will be provided.

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: [taxinstitute.com.au/about-us/privacy-copyright-disclaimer](https://taxinstitute.com.au/about-us/privacy-copyright-disclaimer)

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For further information regarding this event, please contact the National Events Team on 1300 733 842 or email [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au)

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

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

### A Face-to-face registration

	Member	New member*	Non-member
<b>Early bird registration</b> Received on or before 25 October 2024	<input type="checkbox"/> \$750	<input type="checkbox"/> \$1090	<input type="checkbox"/> \$1050
<b>Standard registration</b> Received after 25 October 2024	<input type="checkbox"/> \$950	<input type="checkbox"/> \$1290	<input type="checkbox"/> \$1250

I acknowledge that I will receive electronic access to the available papers and presentations through The Tax Institute CPD app.

#### \*Become a member and save!

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

- save over \$220 on Affiliate membership for the first 12 months
- access member-only prices to this and future events
- access all member-only technical resources.

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

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature:

JOIN TODAY

## 2 Delegate contact details

Member no.:

If your member details are up-to-date, you can skip this section.

Title:  Mr  Mrs  Miss  Ms

Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb:

State:

Postcode:

Telephone:

Mobile:

Email:

Dietary requirement:

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

Total payable \$

Promotional code:

\*Please note: The Tax Institute cannot accept responsibility for delegates' late flight arrivals. Transfer costs are non-refundable and non-transferable. All registration payments must be made prior to the event, unless other arrangements have been made with The Tax Institute.

Cheque payable to The Tax Institute (in Australian dollars)

Credit card \$

Card type:

AMEX

Visa

MasterCard

Diners

Name on card:

Card no.:

Expiry date:

Cardholder's signature:

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

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

**Collection notice:** The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at [www.taxinstitute.com.au](http://www.taxinstitute.com.au). [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.


**To register**


Email [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)


Mail Level 21, 60 Margaret Street, Sydney NSW 2000


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

Join the conversation

 [linkedin.com/school/the-tax-institute](https://www.linkedin.com/school/the-tax-institute)

 [facebook.com/thetaxinstitute](https://www.facebook.com/thetaxinstitute)

 [twitter.com/taxinstituteoz](https://twitter.com/taxinstituteoz)

 [instagram.com/thetaxinstitute\\_](https://www.instagram.com/thetaxinstitute_)

[taxinstitute.com.au](https://www.taxinstitute.com.au)

