

Next Generation Tax Discussion Group

May – November 2025

Multiple locations – Melbourne CBD

1 CPD hour per session

6:00-7:30pm



Connect, discuss, and collaborate at our new Next Generation Tax discussion group!

Stay ahead of the curve by joining the conversation on the latest tax topics and connect with your local tax community!

The *Next Generation Tax Discussion Group* series features four engaging sessions, held bi-monthly from May to November. Each session will focus on a timely topic presented by a subject-matter expert, followed by networking and light refreshments to continue the discussion.

With flexible registration options, you can choose to attend the full series or select individual sessions that align with your interests.

Be a part of the *NextGenTax* series to stay informed on the latest tax trends, elevate your career, and foster valuable connections with your peers and fellow professionals.

Who should attend?

This Next Gen Tax Discussion Group series is designed for tax professionals and is suitable for anyone with up to 8-years experience.

Schedule

May – November 2025

Multiple Locations – Mel CBD

6:00-7:30pm

Registration options

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
Thursday 29 May Venue: Hall & Wilcox Queen & Collins Level 31, Tower 376/390 Collins St Melbourne VIC 3000	Part 1: Capital gains Tax: A practical guide to everyday impacts <p>The inaugural meeting of the Next Gen Tax Discussion Group will be discussing CGT and its ubiquity in the life of a tax advisor. CGT event A1 on the sale of shares or an investment property is merely the beginning.</p> <p>We will discuss (by use of examples) what makes it so pervasive, how it can be mitigated (roll-overs, exemptions, concessions) and its interaction with other parts of the Tax Act.</p>	Speaker: Karen Goodfellow, CTA Goodfellow Tax Advisory
Thursday 10 July Venue: Corrs Chambers Westgarth 25/567 Collins St, Melbourne VIC 3000	Part 2: Thin cap - Australia's new thin capitalisation regime <p>Australia's thin capitalisation regime is a critical consideration for outbound and inbound Australian investors. The session will cover:</p> <ul style="list-style-type: none"> • Overview of the new rules • Key structuring considerations for taxpayers; and • Case studies from the ATO guidance and the key issues that remain unresolved. 	Speaker: Luke Imbriano, FTI Corrs Chambers Westgarth
Thursday 25 September Venue: Velocity Legal North Tower, Level 33, 80 Collins Street Melbourne VIC 3000	Part 3: PSI and Part IVA <p>Starting with the basics we will explore the evolution of income alienation arrangements, how courts and the ATO have responded to these schemes, topical issues and where we are headed with the ATO's latest draft PCG 2024/D2.</p>	Speaker: Andrew Henshaw, CTA Velocity Legal
Thursday 20 November Venue: Thomson Geer Rialto South Tower, Level 23, 525 Collins Street, Melbourne VIC 3000	Part 2: Key learnings from the Bendel case <p>This session will cover:</p> <ul style="list-style-type: none"> • Overview of Division 7A • The facts and legal principles established in the Bendel case • Discuss the impact of the Bendel decision on compliance with Division 7A and other integrity rules. 	Speaker: Adrian Zuccarini, FTI Australian Taxation Office

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.

Andrew Henshaw, CTA, has been a Director of Velocity Legal since the firm was founded in 2016 and was appointed Managing Director on 1 July 2021. He is passionate about leading by example, getting wins for his clients and solving difficult legal issues. Andrew acts for a diverse range of private businesses, high net-wealth individuals and family groups. He specialises in business structuring, tax disputes and complex tax issues. Andrew is a regular contributor and presenter in the tax community, through forums including The Tax Institute.

Luke Imbriano, FTI, is an experienced tax lawyer specialising in the provision of income tax controversy advice and dispute resolution services. He advises large domestic and multinational taxpayers throughout the entire tax dispute lifecycle – from pre and post ATO engagement during large M&A transactions, through to assisting taxpayers prepare for, and resolve, complex ATO reviews, audits and disputes. Luke's focus is on private sector taxpayers in the real property and infrastructure sectors, ranging from owners and operators of real estate and infrastructure assets to investors in infrastructure projects, including pension and private equity funds. Luke is known for his strong technical expertise, critical thinking and commercial solutions which lead to the resolution of complex income tax issues. He is named as a key lawyer by The Legal 500 Asia Pacific and is a committee member for a number of The Tax Institute events, where he regularly presents on emerging income tax issues.

Adrian Zuccarini, FTI, is an Assistant Commissioner within the Tax Counsel Network with over 18 years' experience at the ATO. He provides technical support and guidance on a range of complex issues within private business structure with expertise in taxation issues relating to Professional Firms, trusts, Capital Gains Tax, Division 7A and Part IVA. Adrian has a Business Degree with First Class Honours in Taxation as well as a Master of Law (Juris Doctorate) from Monash University.

“The Next Generation Tax Discussion Group is all about creating a space where emerging tax professionals can engage with contemporary issues, share insights, and build confidence. It's an exciting opportunity to learn, connect, and contribute to the future of our profession.”

Zannie Zaidie, Chair, Next Generation Tax Discussion Group, Vic

For event queries please contact
nationalevents@taxinstitute.com.au

Register now!



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purchase your tickets!**

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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 4-sessions	<input type="checkbox"/> \$80	<input type="checkbox"/> \$475	<input type="checkbox"/> \$120
Single session	<input type="checkbox"/> \$30	<input type="checkbox"/> \$425	<input type="checkbox"/> \$40

Please select your session/s:

☐ Thu, 29 May 44641
 ☐ Thu, 10 Jul 44643
 ☐ Thu, 25 Sep 44644
 ☐ Thu, 20 Nov 44645

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.

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

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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:

☐ 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

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To register

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