The Tax Institute

Local Tax Club Adelaide

18 March – 25 November

Majestic Roof Garden Hotel

1.5 CPD hours per session

Supper Club

Join your Local Tax Club today!

The latest tax knowledge, hot topics and local networking

Being part of your Local Tax Club will keep you on top of the latest tax knowledge, enable connections with peers in your local community and provide you with the opportunity to extend your own professional and personal network.

This series includes 5 sessions, happening monthly from March to November. Each session features a specialist tax topic presented by a subject matter expert, and a monthly tax update to keep you on top of Australia's ever changing tax legislation.

Our flexible registration options mean you can register for the full series or just select the sessions you wish to attend. You can also get your team Involved with a company subscription and send a different team member to each session, which is a great way for them to enhance their knowledge and establish their networks within the profession.

Being part of your Local Tax Club will not keep you on top of the latest tax knowledge connect you with your peers, and fellow members of your tax community.

Register for your Local Tax Club today! Gain valuable resources, stronger connections, and all the latest knowledge in tax.

Who should attend?

This series will provide you with quintessential updates and topical tax content tailored for you and your local tax community.

Schedule

18 March – 25 November

Majestic Roof Garden Hotel

1.5 CPD hours per

Registration options

Company subscription

Pre-purchase credits to be spread across your firm throughout the year at a discounted price. Each month nominate the person you wish to register, and we take care of the rest. You can top up session credits at any time.

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
Tuesday 18 March 5.30-7.00pm ACDT Majestic Roof Garden Hotel 55 Frome St, Adelaide	**Part 1: Fringe benefits tax update – Opportunities, challenges and strategies** A review and update of opportunities and common pitfalls in respect of the application of fringe benefits tax ("FBT"), including: • Recent developments and ATO review activity • Interaction of FBT with GST, income tax, Division 7A and ETP rules • Common errors and misconceptions • Structuring and implementing effective salary sacrifice arrangements • Review of exemptions to minimize FBT liability.	**Speaker:** Raoul Stevenson, CTA, Nexia Edwards Marshall **Tax update presenter:** Eliza Sims, Nexia Edwards Marshall
Tuesday 27 May 5.30-7.00pm ACST Majestic Roof Garden Hotel 55 Frome St, Adelaide	**Part 2: Understanding the recent changes to your TASA obligations** Substantial changes have been made to the Code of Professional Conduct obligations in the *Tax Agent Services Act 2009*. While many of the changes to the Code Determination broadly address the concerns raised by the Joint Bodies, the impact of the changes will be keenly felt by registered tax practitioners who face an additional compliance burden. Join Robyn Jacobson, CTA as she works through the key changes to help you navigate your new obligations. The session will cover: • The latest changes to the Code of Professional • Conduct obligations • The breach reporting rules • When the changes apply • Available TPB guidance.	**Speaker:** Robyn Jacobson, CTA, The Tax Institute **Tax update presenter:** Nick Wilkins, CTA, Wilkins Advisory

Tuesday 22 July 5.30-7.00pm ACST Majestic Roof Garden Hotel 55 Frome St, Adelaide	**Part 3: SMSFs - Contractors, compliance and unit trust investments** Join us for a practical seminar exploring two key aspects of SMSF compliance and strategy. In the first session, we unpack the complexities of contractor classification under superannuation law, including how the definition of "employee" for superannuation purposes differs from general employment law, the implications of contracts for labour, and the impact of recent High Court decisions. We'll also highlight high-risk industries and the importance of understanding employment relationships in SMSF compliance. The second session delves into investing in unit trusts, covering the differences between geared and non-geared trusts, trust deed requirements, in-house asset rules, Part 8 associates, and when borrowing is permitted. Ideal for accountants and advisers seeking clarity and confidence in managing compliance and structuring investments.	**Speaker:** Peter Bosco, Bosco Law **Tax update presenters:** Nicholas McCann, WRP Legal Lucy Simeoni, WRP Legal
Tuesday 23 September 5.30-7.00pm ACST Majestic Roof Garden Hotel 55 Frome St, Adelaide	**Part 4: Navigating the complexity of small business CGT concessions** The Small Business CGT Concessions continue to provide very generous tax concessions for eligible taxpayers. For a regime designed to support smaller business, the rules in Division 152 are disproportionately complex – largely due to the generosity of the concessions that has historically been exploited by larger taxpayers. However, despite their complexity, the concessions can still lead to fantastic tax outcomes for private groups working towards a liquidity event. The lack of indexation of the $2m turnover test has seen more taxpayers relying on the (often more subjective) net asset value test to assess their eligibility. Using practical examples and case studies, this session will outline some of the common challenges in applying the concessions in the real world.	**Speaker:** Phil Shepperd, CTA, Arcem Advisory **Tax update presenter:** Brett van Nieuwmans, ATI, Arcem Advisor
Tuesday 25 November 5.30-7.00pm ACST Majestic Roof Garden Hotel 55 Frome St, Adelaide	**Part 5: The taxing part of employment** This session will discuss: • STP2 expansion and associated impact, including to State Revenue Offices • Payroll tax under the microscope • Payday Super: what has happened? • FBT is around the corner - changes to keep in mind • Q&A.	**Speaker:** Deepak Jes, Vialto Partners **Tax update presenter:** Tim Cooper, Vialto Partners

Presenters

Peter Bosco, is the principal of Bosco Law. After working at some of Adelaide's most prominent firms, Peter established his practice in 2018. He has 15 years of experience successfully acting for private enterprises. He also acts for a number of accountants and law firms. As well as a degree in law, Peter has an accounting degree and a masters degree in tax law.

Tim Cooper, ATI, is a senior manager offering global mobility services as part of Vialto Partners' practice specialising in cross-border taxation issues. His clients include local, national and multinational companies as well as individual expats, athletes, sporting teams and associations. He focuses on understanding different perspectives and developing practical solutions, with a particular interest in tax planning and compliance for individuals travelling to and from Australia. He also assists clients to manage employment tax, payroll and equity scheme obligations as a result of globally mobile employees and executives.

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She has more than three decades in the profession, including a public practice background that preceded her various training roles over 23 years. A regular conference and webinar presenter, Robyn is also an avid advocate, social media commentator, columnist and blogger, and hosts The Tax Institute's TaxVibe podcast. She is frequently quoted in the media. Robyn is a Chartered Tax Adviser of The Tax Institute, and a Fellow of both CA ANZ and CPA Australia. She regularly consults with the Treasury, ATO and professional associations on technical issues including as Co-Chair of the ATO's Tax Practitioner Stewardship Group and a member of various other working groups. Robyn has been recognised as a Thought Leader five times over four consecutive years (2019–2022) as Winner of this category across the Women In Finance Awards and the Australian Accounting Awards. Robyn was the Winner of the Accountants Daily Excellence Award 2020 and was named in the global Top 50 Women in Accounting 2019.

Deepak Jes is a senior consultant at Vialto Partners, specialising in employment tax advisory and automation for globally mobile workforces. With experience at Vialto Partner and PwC Australia, he support local and multinational clients in solving complex employment tax issues, including superannuation guarantee, fringe benefits tax, PAYG withholding, STP2, and payroll tax. His approach combines a deep understanding of regulatory requirements with practical, automated solutions. Leveraging tools like Microsoft Power Automate & Alteryx, he streamlines processes and enhances compliance, allowing clients to focus on strategic priorities. My mission is to provide insights that not only meet business objectives but also foster continuous learning and innovation

"I've found the Local Tax Club a great way to put time aside to maintain my technical knowledge as well as meet and network with my colleagues and peers"

Debbie Severin, Tennant Schultz

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within both the global mobility landscape and for domestic organisations.

Nicholas McCann is a Senior Associate at WRP Legal & Advisory. He has a Bachelor of Laws (Honours) and a Bachelor of Commerce (Honours), majoring in Accounting, from the University of Adelaide.

Nicholas has extensive experience in taxation advisory as well as tax dispute resolution and lodging submissions with federal and state revenue authorities. Nicholas regularly advises on commercial transactions, in particular taxation planning and structuring, asset acquisitions and disposals, taxation compliance, not-for-profit organisations, restructures and transactional advice.

Nicholas works with senior and junior practitioners and other professional advisors to provide advice on a wide range of corporate, commercial and taxation issues (at both federal and state level), to a broad range of clients including private high-net-worth individuals, family groups, large companies (including ASX listed companies) and not-for-profit organisations.

Nicholas is also a member of the Law Society of South Australia and the Golden Key International Honour Society (Law and Commerce). In addition to his role at WRP Legal & Advisory, Nicholas tutors Financial Accounting in the Adelaide University Business School.

Philip Shepherd, CTA, is a is a tax partner at Arcem Advisory, working primarily with complex family groups and mid-market corporates. During his 17 years in practice in mid-tier and big 4 firms, Phil has advised some of South Australia's most iconic families, helping them navigate through restructures, divestments, acquisitions, succession planning, international tax structuring and ATO reviews.
With a background focussing on in-bound corporate groups, Phil has a passion for seeing global business thrive in South Australia; and local businesses succeed off-shore.
Phil is a Chartered Accountant, a Chartered Tax Advisor, and winner of the 2021, SME Tax Advisor of the Year Award.

Lucy Simeoni is a Director at WRP Legal. She specialise in commercial tax, Lucy advises clients on income and capital gains tax, GST, stamp duty, payroll tax, and state and federal taxation disputes.

She works with a diverse client base, from small enterprises to large private businesses and high-net-worth individuals, with notable expertise in the pharmacy and retirement village sectors.

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

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

Eliza Sims is a Senior Manager at Nexia Edwards Marshall specializing in Business Consulting and Taxation, with a passion for the healthcare industry. She assists a diverse range of clients with strategic and taxation needs. Eliza has a varied experience, allowing her to offer thoughtful analysis and interpretation across business areas. She is also a financial delegate (director) on a health and not-for-profit board, managing finances and contributing to strategic direction. Eliza holds several qualifications, including a Master of Professional Accounting and a Master of Public Health.

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

Brett van Nieuwmans is an associate director at Arcem Advisory with 10 years of experience providing tax and financial reporting services in the mid-market. Brett has previously worked in tax in big 4 and in financial reporting for large corporates. Brett has a particular interest in how emerging technologies will shape the future of the Australian tax and financial reporting landscape.

Nick Wilkins, CTA, provides taxation, accounting and business services to clients ranging from individuals to high net wealth family groups. His areas of speciality include capital gains tax (including the small business CGT concessions), deceased estates and small business entity concessions.

Nick is a long-standing contributor to the Australian accounting profession through his involvement with The Tax Institute, both locally and nationally. He was chair of the SA State Council 2021-22 and has served as a member of the National Convention Organising Committee and the SA Organising Committees. He has made numerous presentations for The Tax Institute on topics including personal services income, employee/contractors and structuring.

The Tax Institute

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A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

1 Registration

Please select your registration type:

	Member	New member*	Non-member
Full series 5 pack	☐ $350	☐ $740	☐ $500
Single session	☐ $100	☐ $490	☐ $150

Please select your session/s:

☐ Tue, 18 Mar 44253 ☐ Tue, 27 May 44254 ☐ Tue, 22 Jul 44255 ☐ Tue, 23 Sep 44256 ☐ Tue, 25 Nov 44257

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

Signature:

Date of signature: DD/MM/YYYY

2 Delegate contact details

Member no.: **If your member details are up-to-date, you can skip this section.**

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms Date of birth: DD/MM/YYYY

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

☐ Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking

3 Payment method

Please note: all registration payments must be made prior to the event, unless other arrangements have been made with The Tax Institute.

☐ **Cheque payable to The Tax Institute** (in Australian dollars)

☐ **Credit card** Card type: ☐ AMEX ☐ Visa ☐ MasterCard ☐ Diners

Name on card:

Card no.: Expiry date: MM/YY

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