The Tax Institute

Local Tax Club Geelong

21 February – 28 November 2025

Novotel Geelong

1.5 CPD hour per session

Breakfast Club Series

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, connected with peers in your local tax community and up to date on essential tax hot topics which may impact you and your clients.

This series includes 10 sessions, happening monthly from February 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

21 February – 28 November 2025

1.5 CPD hours per session

Novotel Geelong

Registration options

Full series

Register for the full series and receive an event reminder and materials ahead of each session.

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.

5 session subscription

5 session credits to use throughout the year at the discounted price allowing you to choose which months you would like to attend.

Individual sessions

Tailor your attendance by simply indicating your preferred session/s on the registration form.

Technical Program

Date/Time	Session	Presenter
Friday **21 February** 7.30-9:00am AEST Novotel Geelong	**Part 1: SMSF internal disputes and how to resolve and avoid them** As the SMSF system matures we are seeing more and more disputes between members and trustees. Disputes can involve members wanting to exit, decisions around investments, death benefit disputes and one of the member/trustees going rouge. This session will discuss real life examples of SMSF internal disputes as well as tools for resolving, and preventing, such internal disputes	**Speaker:** Phil Broderick, CTA, Sladen Legal **Tax update presenter:** Rob Warnock, CTA, Harwood Andrews
Friday **28 March** 7.30-9:00am AEST Novotel Geelong	**Part 2: Key learnings from Bendel case** This session will cover: • The facts and legal principles established in the Bendel case • Analyse its impact on income tax law and deductibility rules • Apply insights from the case to practical scenarios in tax compliance and advisory.	**Speaker:** Michael Bearman, CTA, Victorian Bar Adrian Zuccarini, Australian Taxation Office **Tax update presenter:** Rob Warnock, CTA, Harwood Andrews
Wednesday **16 April** 7.30-9:00am AEST Novotel Geelong	**Part 3: Tax Practitioner Board and TASA changes** As the dust settles on the substantial changes to the Code of Professional Conduct (**Code**) obligations in the *Tax Agent Services Act 2009*, which apply to larger practitioners from 1 January 2025, it is important for smaller practitioners to understand the impact of the changes and ensure they are prepared for when the regime expands to include them from 1 July 2025. Join Arthur Athanasiou, CTA (Life) and Robyn Jacobson, CTA as they work through the key changes to help you navigate your new obligations. Including the use of case studies, the session will cover: • Recent changes to the Code obligations • Breach reporting rules • Available TPB guidance.	**Speakers:** Arthur Athanasiou, CTA-Life, Thomson Geer Lawyers Robyn Jacobson, CTA, The Tax Institute **Tax update presenter:** Kaitilin Lowdon, ATI, Sladen Legal

Friday
23 May

7.30-9:00am AEST
Novotel Geelong

Part 4: End of year review

As the end of the 2024-25 income year draws near, this session will take the opportunity to revisit key developments taking place in the year gone by, and also look ahead to planning for 2025-26.

Speaker:
Karen Goodfellow, CTA, Goodfellow Tax Advisory

Tax update presenter:
Rob Warnock, CTA, Harwood Andrews

Friday
20 June

7.30-9:00am AEST
Novotel Geelong

Part 5: Estate planning - Structural implications (pre- and post-death) and residency

This session will discuss:

- Succession of key structures as part of the plan including:
  - Companies
  - Trusts; and
  - Businesses
- Continuity and what can go wrong
- Key documents to get it right including
  - Trust deeds
  - Company constitutions
  - Shareholder / unitholder / buy sell agreements; and
  - Family agreements / constitutions.
- Residency issues with estates
  - Control considerations for different structures
  - Managing tax issues and overseas residents; and
  - Some practical examples of how to reduce risks.

Speaker:
William Moore, Hall & Wilcox

Tax update presenter:
Rob Warnock, CTA, Harwood Andrews

Friday
18 July

7.30-9:00am AEST
Novotel Geelong

Part 6: GST and real property – When things go wrong

The application of GST to real estate transactions can be complex, with sales potentially being treated as taxable, input taxed or GST-free. To add further complication, it falls to the parties to negotiate and document how the GST is to be applied and which party is to bear the economic burden of GST. Unsurprisingly, this has led to numerous disputes between parties, many of which have proceeded to the Courts.

This presentation considers some of the more recent disputes and seeks to highlight a number of potential GST pitfalls for vendors and purchasers when structuring real estate transactions.

Speaker:
Chris Sievers, Victorian Bar

Tax update presenter:
Rob Warnock, CTA, Harwood Andrews

Friday
22 August
 	
7.30-9:00am AEST
Novotel Geelong
	Part 7: Small business restructuring
	
	This session will cover the following:
	• Introduction to the Small Business Restructuring provisions
	• The Debt Restructuring Process
	  - Summary of the process
	  - Who is eligible
	  - How to begin
	  - During the process
	  - Ending the restructuring
	  - Protections on offer
	• Temporary insolvent trading
	• How to avoid liability as an advisor
	• Recent cases
		Speaker:
		Ali Erskine, Harwood Andrews
		
		Tax update presenter:
		Rob Warnock, CTA, Harwood Andrews

Friday **19 September** 7.30-9:00am AEST Novotel Geelong	**Part 8: The Hidden Tax Consequences of Family Law** The session will include: • Navigating Division 7A and CGT rollovers • Small Business CGT Concession Claims • Super Splitting and Property Transfers • Protecting the Family Jewels from Divorce; and • The Bank of Mum and Dad.	**Speaker:** Andrew Henshaw, CTA, Velocity Legal **Tax update presenter:** Rob Warnock, CTA, Harwood Andrews
Friday **17 October** 7.30-9:00am AEDT Novotel Geelong	**Part 9: State Taxes – The current landscape** In this session Megan and Simon will explore current issues in the State tax landscape, and tips and traps for navigating regulator engagement. It has been a rapidly changing landscape over recent times, and the session will be adapted for the topical issues at the time, but will cover at least: • Payroll tax relevant contractor and employment agent provisions • Land tax exemptions for primary production land and the vacant residential land tax • Stamp duty; and • Windfall gains tax.	**Speakers:** Megan Bishop, Piper Alderman Simon Tisher, CTA, Victorian Bar **Tax update presenter:** Rob Warnock, CTA, Harwood Andrews

Friday
28 November

7.30-9:00am AEDT
Novotel Geelong

Part 10: Navigating the matrix of ATO reviews, audits and beyond - A taxpayer's survival guide

Just how deep does the rabbit hole go? The ATO's assurance and risk-based reviews or audits are no longer anomalies but an inevitable part of the tax journey. They should be expected, and the scrutiny can feel as labyrinthine as the Matrix itself. Much like Neo stepping into the Matrix, taxpayers and advisors alike must be ready to face a set of challenges that are as unpredictable as they are daunting.

This session will take you through the "Matrix" of ATO reviews and audits, highlighting the common challenges encountered, and providing practical strategies to navigate the complexities, including:

- Facts and evidence
- Assessments and period of review
- Penalties
- Voluntary disclosures; and
- Preventing disasters.

Speakers:
Kaitilin Lowdon, ATI, Sladen Legal
Gareth Redenbach, Victorian Bar

Tax update presenter:
Rob Warnock, CTA, Harwood Andrews

Presenters

Arthur Athanasiou, CTA (Life), is a partner at Thomson Geer. Arthur's main area of practice is dispute resolution, particularly in the SME sector, with the ATO, TPB and the SRO. Arthur has many years' experience in complex tax audit, negotiations, settlements and tax litigation. He also has broad experience in the taxation of SME entities, with an emphasis on Division 7A and high wealth individuals and family groups. Arthur is an associate professor at La Trobe University Law School. He has qualified as a Chartered Accountant, is a former President of The Tax Institute, chaired the Law Institute's Tax Law Advisory Committee and now serves on the Industry Advisory Board of the IPA-Deakin University SME Research Centre.

Michael Bearman, CTA, has 35 years' experience representing clients in taxation matters. He is a Chartered Tax Advisor and has sat on numerous Tax Institute committees over many years. He has been consistently ranked by Doyles Guide as Melbourne's one of Melbourne's pre-eminent taxation barristers since 2016. A regular speaker and writer, Michael's most recent publications are Taxing matters: Judgments and settlements, Victorian Bar News, Issue 166 (2020) and Fifty shades of Greig: the spectrum of taxpayers in share trading, with P Klank, Taxation in Australia, (2020) Vol. 50(5).

Megan Bishop is a Tax Dispute partner at Piper Alderman. For more than 15 years she has represented a diverse client base in matters involving the revenue and tax regulatory authorities. From assisting with transactional phase risk mitigation strategy through to acting in the High Court, Megan works across the full spectrum. She has appeared in all Victorian and Federal tax Tribunals and Courts and numerous interstate ones. Beyond her legal credentials, Megan is also a certified mediator and holds a Chemical Engineering degree. Megan is recognised for Tax Law in the 2025 edition of The Best Lawyers in Australia.

Phil Broderick, CTA. is a principal of Sladen Legal and heads its superannuation team. He is member of a number of superannuation related committees, including being a member and the former chair of The Tax Institute's superannuation committee and director and chair of the Institute of Financial Professionals Australia technical and policy committee. He is also a member of the ATO's the Superannuation Industry Stewardship Group . Phil is also heavily involved in liaising with Treasury and ATO in relation to the implementation of new super laws and administrative practices. Phil's areas of practice include superannuation, duties and state taxes, estate planning and succession, trusts, federal tax and business structuring. Phil was listed in the 2020 to 2025 Best Lawyers Australia for superannuation law, was recommended in Doyles leading Victorian tax lawyers for 2021 and 2023 and was the winner of the SMSF Association's SMSF Specialist Advisor (SSA) Top Achiever Award in 2019.

"The Tax Institute's Breakfast Club offers an excellent opportunity to learn from industry experts, gain practical tips for navigating the ever-evolving tax landscape, and connect with the vibrant Geelong tax community. I highly recommend it to colleagues seeking to deepen their expertise and grow their professional network."

Laura Spencer, ATI, KHQ Lawyers

Ali Erskine is a Principal at Harwood Andrews. Ali has more than 15 years post qualification experience. Ali joined Harwood Andrews with significant experience in all areas of commercial dispute resolution and regularly advises business clients to resolve disputes and manage risk. Ali is a specialist in relation to terminal and non-terminal insolvency, securities, and security enforcement. Ali also has significant experience relating to shareholder oppression claims and disputes arising in the context of trading trusts. Ali provides technical and strategic advice to clients including businesses, company officers, insolvency practitioners, banks, creditors and government organisation.

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. Shannon leads Velocity Legal's family law practice. Shannon has a reputation for professionalism and empathy. She is a skilled negotiator and dedicated advocate for her clients. Shannon practises exclusively in family law and has wide experience acting for clients across all areas of family law. Shannon applies her detailed understanding and knowledge of family law in a practical way, to achieve negotiated settlements wherever possible. Where court proceedings become necessary, she provides high level representation and utilises her commercial and litigation skills to achieve cost effective resolutions.

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.

For event queries please contact the Events team:
VIC@taxinstitute.com.au

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Kaitilin Lowdon, ATI, is a Principal Lawyer in Sladen Legal. She acts for a diverse range of clients, including (ultra) high net wealth individuals, family offices and business enterprises. Her expertise includes advising clients on high-profile and complex tax matters, including reviews, audits and litigation, and transactions, across a wide range of taxation matters.

William Moore is a partner at Hall & Wilcox and leads the national Private Client practice. William is widely regarded as a leading practitioner in the area of succession planning, trusts, estate administration and estate and trust disputes. When advising clients through their succession planning goals and issues, William is driven to achieve realistic outcomes for his clients in their personal and business succession planning. He has a broad range of clients, from those with young families to some of Australia's largest family groups, as well as business owners and people moving towards retirement. William's practical insight into many issues, concerns and needs that arise at different stages of life is widely sought, and he regularly publishes articles and presents to Hall & Wilcox clients and professional bodies including Leo Cussen and The Tax Institute. William is regularly quoted by the AFR and speaks on radio station 3AW.

Gareth Redenbach is a barrister practising in revenue law and has over 15 years of experience in tax matters. He has advocated in all trial divisions in Victoria as well as in the High Court, Full Federal Court and Victorian Court of Appeal. He has appeared for both taxpayers and the Commissioner and including for the successful taxpayer in the Full Federal Court decision on taxation of trusts in Lewski v Commissioner of Taxation (2017) 254 FCR 145 and for the successful Commissioner in the first domicile case decided post-Harding (Handsley v Commissioner of Taxation [2019] AATA 917). Prior to joining the bar, Gareth was in-house counsel for the Macquarie Group based in New York responsible for managing transfer pricing and international tax matters across the Americas region. Gareth was previously a Senior Associate at Minter Ellison focussed on tax controversy and began his career in the international tax department of PwC. Gareth is a Senior Fellow at the University of Melbourne teaching in their LLM program and also teaches in the Victorian Bar's Readers' Course on taxation matters. Gareth is the former Chair of the Corporate Section and Executive Committee member of the US Committee of Banking Institutions on Taxation. Gareth also regularly participates and speaks at TIA, OECD, IFA and other conferences.

Christopher Sievers practises primarily in revenue law, with a particular focus on GST and indirect taxes such as stamp duty, land tax and payroll tax. Since being called to the Bar in 2001, Chris has developed a substantial advice practice and has appeared on behalf of taxpayers and the Revenue in numerous matters, including GST appeals before the High Court in Reliance Carpet, Qantas and Travelex No.2.

Simon Tisher, CTA, has been a barrister at the Victorian Bar since May 2003. He is well known and respected as a barrister and within the tax profession. Most of Simon's experience at the Bar relates to tax matters (state and federal) and matters related to taxation: superannuation, insolvency, bankruptcy and professional indemnity claims (commonly involving tax advice). He acts for taxpayers and for the Australian Taxation Office in disputes ranging from small individual matters to large corporate tax disputes. Simon has sound experience in commercial litigation matters and has a busy advisory practice. Simon also has an interest in National Disability Insurance Scheme matters. Simon has been included in "Leading Tax Barristers - Victoria" in Doyles Guide every year from

2017 and in Best Lawyers (Tax Law, 2021, 2022 and 2023 editions). He is a past Sir Charles Lowe prize winner for advocacy. Simon has published several articles in the Law Institute Journal and Taxation in Australia and is the author of the tax chapter of de Groot's Wills, Probate and Administration Practice (Victoria). He is a member and past chair of The Tax Institute's State Taxes Committee. He is a frequent presenter to organisations such as Television Education Network, the Tax Institute and Legalwise Seminars.

Robert Warnock, CTA, is a Principal Lawyer at Harwood Andrews, Victoria's largest firm with a head office based in a regional centre. Rob has over 30 years' experience in tax advising. Rob helps accountants, businesses and individuals on matters with his areas of practice including trusts, state and federal taxes, tax disputes, business structuring and asset protection.

Adrian Zuccarini 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 Tax Institute

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
Single Session	☐ $150	☐ $540	☐ $200
5 Pack	☐ $600	☐ $990	☐ $750
Full Series 10 Pack	☐ $1200	☐ $1590	☐ $1500
Company Subscription	☐ $1350	N/A	☐ $1350

Please select your session/s:

☐ Fri, 21 Feb 44213	☐ Fri, 28 Mar 44214	☐ Wed, 16 Apr 44215	☐ Fri, 23 May 44216	☐ Fri, 20 June 44217
☐ Fri, 18 July 44218	☐ Fri, 22 Aug 44219	☐ Fri, 19 Sept 44220	☐ Fri, 17 Oct 44221	☐ Fri, 28 Nov 44222

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:

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

3 Payment method

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

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

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

Name on card:

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