The Tax Institute

Local Tax Club Perth

February – November 2025

1.5 CPD hours per session

HHG Legal, Perth

Hosted by:

HHG LEGAL GROUP®

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

26 February – 26 November 2025

1.5 CPD hours per session

HHG Legal, Perth CBD

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
Wednesday 26 February 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 1: Tax governance** This session will discuss key considerations and best practices in relation to tax governance, including: • Governance and tax governance principles • Practical approaches to risk management in tax control; and • Policy and framework development relevant to SME.	**Speaker:** Michelle Todd, HHG Legal **Tax update presenter:** Tracey Dunn, EY
Wednesday 26 March 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 2: Small business CGT – 15-year exemption** The capital gains tax concessions are quite generous for small businesses but also quite complicated to review and access particularly the 15-year exemption. If your client qualifies for the 15-year exemption, the entire capital gain on the transaction is exempt which can have a significant impact on the cashflow of your client and their eventual retirement. This session is designed to improve your understanding of these rules by providing an overview of the 15-year exemption, including: • Key conditions – Eligibility – Individuals • Key conditions – Eligibility - Companies and trusts • In connection with retirement – What is the ATO's view? • Death and 15-year exemption; and • Case studies.	**Speaker:** Sammy Syed, RSM Australia **Tax update presenter:** Tracey Dunn, EY

Wednesday 30 April 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 3: GST & the accidental property developer** Property is perhaps the most contentious and often misunderstood sector when it comes to GST. Taxpayers need to traverse the complexities of the margin scheme, input tax credit denial and residential properties. Most importantly for this presentation, it is one of the few areas where Mum and Dad taxpayers can get caught in the somewhat murky area of "enterprise", drawing them into the GST net. Their investment/holding/realisation of land and property can tip over from the private and domestic/capital/out of scope tax domain into the business/revenue/taxable supply realm. This session will use case studies to show how intentions can change giving rise to GST liabilities for the accidental developer.	**Speaker:** Tony Ince, Moore Australia **Tax update presenter:** Tracey Dunn, EY
Wednesday 28 May 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 4: Trusts – Division 7A, s100A and case law updates** In light of significant cases such as *Owies* and *Bendel*, this session will explore the evolving landscape for trusts and will explore: • Recent developments in relation to Division 7A • 100A; and • Trust law in general.	**Speaker:** Daniel Taborsky, CTA, Birchstone Tax Law **Tax update presenter:** Tracey Dunn, EY
Wednesday 25 June 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 5: How a tax accountant can best assist their client when going through a divorce or separation** In matters where parties are engaged in Family Court proceedings regarding financial matters, tax practitioners can provide invaluable assistance to the court and their client(s) in respect of provision of documents, identification of tax issues, and advice on how best to implement a property settlement in a manner which minimises tax for both parties.	**Speaker:** Ben Majoe, HHG Legal **Tax update presenter:** Tracey Dunn, EY

Wednesday **30 July** 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 6: Planning for death and new superannuation developments** This session will provide an SMSF update, with a focus on: • Planning for death – tips, traps and strategies to assist clients; and • New super developments.	**Speaker:** Christie Butler, CTA, Cooper Partners Financial Services **Tax update presenter:** Tracey Dunn, EY
Wednesday **27 August** 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 7: Succession, death and taxes** So, after you have done a great job helping your client build significant personal wealth and a successful business portfolio, what is the next step? Succession and death are some of the topics most advisors find difficult raising with their clients. From a tax perspective a good succession and estate plan is the key to ensuring that your clients can leave a long-lasting legacy from their hard work and perseverance accumulated over many years. In this presentation, we will explore the tips and traps for assisting your clients in devising an effective succession and estate plan.	**Speaker:** Yikai Hoe, CTA, Provident Lawyers **Tax update presenter:** Tracey Dunn, EY
Wednesday **24 September** 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 8: Objections & private rulings – Know your end game!** Objections and private ruling applications - although your reasons for dealing with the ATO on these will be very different, there are many similarities in how you should prepare if you want a successful outcome for your client. This session will cover: • Formalities and legal requirements • The importance of understanding the statutory context • Options available and strategies to consider; and • Tips and traps (aka when things go wrong).	**Speaker:** Modiesha Stephens, CTA, MS Legal **Tax update presenter:** Tracey Dunn, EY

Wednesday 29 October 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 9: Div 328 Restructuring** This session will explore the tips and traps of the SBRR provisions in Division 328-G. Learn how these rules can facilitate tax-effective restructuring for eligible businesses and understand the technical nuances that can impact client outcomes.	**Speaker:** Gaurav Chitnis, CTA, HLB Mann Judd **Tax update presenter:** Tracey Dunn, EY
Wednesday 26 November 7.30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 10: Payroll Tax – Developments and the impact of recent cases** This session will look at recent cases and the direction for payroll tax for those engaging workers. It will look at the broadening of the application of payroll tax from the employee/contractor issue to the overlapping application to “employment agents” to a range of workers including those in the gig economy. This session will also consider the application of the “relevant contract” provisions to the administration of payroll tax in Western Australia. We will look at the history and evolution of this provision and show how, even though it does not currently apply in WA, its effects could be felt to bring such payments within the WA payroll tax regime.	**Speaker:** Tony Ince, Moore Australia **Tax update presenter:** Tracey Dunn, EY

Presenters

Christie Butler, CTA, is a senior manager with Cooper Partners Financial Services. Initially working in both tax and super, Christie has specialised in SMSFs over the last 20 years in both superannuation compliance and advice. She has a keen interest in assisting SMSF's with rectifying compliance issues, estate planning and divorce.

Gaurav Chitnis, CTA, is a Partner at HLB Mann Judd. He is a Chartered Accountant, CPA, Chartered Tax Advisor, and a lawyer admitted to the Supreme Court. Gaurav has over 18 years of experience as a tax advisor in the SME space and specialises in CGT, Division 7A, business restructures, taxation of trusts and tax residency. Gaurav's clients are predominantly other accountants who require specialist tax advice and assistance with rulings, objections and managing ATO audits for their clients. Gaurav is a regular presenter at various tax forums and is also a guest lecturer at Curtin University.

Dr Stephen Cohen is the Managing Associate for our Family Law team. Dr Cohen's practice encompasses a broad range of matters including children matters, financial matters, child support matters, spousal support applications and relocation cases. Dr Cohen has a particular interest in complex child related matters and spousal maintenance applications and is an Independent Children's Lawyer.

Tracey Dunn is a Director with EY, Private – Tax in Perth. 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.

Yikai Hoe, CTA, is the director and founder of Provident Lawyers, a superannuation, taxation and commercial law firm in Western Australia. He is a SMSF Specialist Advisor, Chartered Tax Adviser and a Trusts and Estate Practitioner. Yikai works closely with clients and their advisors to provide legal support on a myriad of value-added solutions for all types of superannuation, tax and commercial matters. He enjoys working on complex transactions and compliance issues involving complicated structures, trusts, and SMSFs. Yikai is passionate about sharing his knowledge. He has presented on many superannuation, tax, trusts, estate and succession planning and commercial law topics.

" If you aspire to being a great Tax Professional, keeping up to date with tax technical knowledge is integral. There is no better way to do that than getting to the Local Tax Club for a nice coffee and continental breakfast each month and hearing the latest in tax being delivered by your tax peers in a friendly, professional manner."

Shane Wagner, CTA, Duncan McPhail & Co

For event queries please contact Alexia Petrollino:

wa@taxinstitute.com.au
+61 08 6165 6609

Register now!

Scan the code to purchase your tickets!

Tony Ince has more than 30 years' experience in indirect tax matters. He has been involved in the GST since its inception in Australia and was the spokesperson for CPA WA during implementation. Tony also practices in the area of Fuel Tax Credits and state taxes, such as payroll tax and land tax. In this capacity, he has presented on indirect tax topics at numerous state and national events, including CPA Congress and Taxation Institute State Taxes Conferences. Since 2003, he has lectured as a sessional lecturer in undergraduate and post-graduate tax at Curtin University and also instructs for the Tax Institute in their "Structured Education Program".

Modiesha Stephens, CTA, is a Director at MS Legal practising in taxation, commercial law and estate planning. Modiesha has over 25 years' experience in advising SME and individual clients in all areas of State and Federal taxation with a particular emphasis on transactional tax advice, including income tax, CGT, GST, transfer duty and other State taxes. In addition to being a Chartered Tax Adviser, Modiesha has degrees in law and commerce and a Master of Laws. Modiesha is an avid supporter of the Tax Institute having served on various committees over the years including as Chair of the WA State Council.

Sammy Syed is a Senior Manager in the Perth Tax Services division. Sammy has a broad spectrum of business and tax knowledge, focusing on all aspects of his client's affairs, including exposure to business structure reviews, different aspects of CGT including concessions and rollovers. He looks to achieve measurable growth and improve financial performance of the businesses he works with in addition to providing specialist tax solutions.

Daniel Taborsky, CTA, is the managing director and founder of Birchstone Legal Group, which is a boutique law firm specialising in tax, trusts, succession and estate planning solutions for privately owned enterprises and high-net-worth individuals. Daniel advises on tax and duty issues, including acting for clients in disputes with revenue offices, and has been recognised as a leading tax lawyer by Doyle's Guide since 2020. He also assists families with tax and duty effective succession planning and advises on trust law issues. He works closely with other professionals including accountants, other lawyers, liquidators and financial advisers.

Michelle Todd is an accomplished legal professional with over a decade of experience across leadership, governance and legal advisory roles. She specialises in providing strategic legal and commercial advice, focusing on governance, risk management, contracts and procurement. Michelle's experience extends to both public and private sectors, where she has established herself as a trusted advisor and leader. Before joining HHG Legal Group, Michelle held senior roles in local government, leading reform initiatives, providing in-house legal services and managed risk functions. Michelle has navigated high profile legal matters, complex governance support and advisory services (private and public sector) and delivered contemporary commercial advice. Michelle combines a strategic mindset with practical problem-solving skills to deliver tailored solutions for her clients, always balancing legal and commercial considerations.

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
10 session subscription	☐ $700	☐ $1,090	☐ $1,000
5 session subscription	☐ $350	☐ $740	☐ $500
Company subscription	☐ $850	☐ N/A	☐ $850
Individual session	☐ $100	☐ $490	☐ $150

Please select your session/s:

☐ Wed, 26 Feb 44260	☐ Wed, 26 Mar 44261	☐ Wed, 30 Apr 44262	☐ Wed, 28 May 44263	☐ Wed, 25 Jun 44264
☐ Wed, 30 Jul 44265	☐ Wed, 27 Aug 44266	☐ Wed, 24 Sep 44267	☐ Wed, 29 Oct 44268	☐ Wed, 26 Nov 44269

Dietary requirements:

Promotional code:

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Sign up for membership along with your event registration to:

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

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taxinstitute.com.au/membership

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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

Cardholder's signature:

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