The Tax Institute

Local Tax Club Sydney

18 February – 18 November 2025

Hosted by Hall & Wilcox

1.5 CPD hours per session

Breakfast Club Series

Hosted by

Hall&Wilcox
smarter law

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

18 February– 18 November 2025

Hosted by Hall & Wilcox

1.5 CPD hours per session

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
Tuesday 18 February 7.30-9:00am AEDT Hall & Wilcox Level 18/347 Kent St Sydney	**Part 1: Tax agents code of conduct** Tax Practitioners recognise that upholding integrity in the tax system and the profession is essential to maintaining public trust and confidence. In this context significant changes and reforms have been made to the Tax Agent Services Act 2009 (TASA), including the Code of Professional Conduct. This session will: • focus on the Code Determination and the introduction of 8 additional Code obligations to supplement the existing obligations; and • highlight how the Code Determination provides additional certainty to tax practitioners on the intent and scope of the new Code obligations.	**Speaker:** Debra Anderson, ATI, Tax Practitioners Board **Tax update presenter:** Bradley White, Hall & Wilcox Lawyers
Tuesday 18 March 7.30-9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 2: Super SMSF update** In the session, we look at the latest superannuation regulatory changes particularly those impacting SMSFs. the session will also address the latest ATO activities in the SMSF space impacting clients and practitioners and review new topical case law related to SMSFs.	**Speaker:** Graeme Colley, Auditors Institute **Tax update presenter:** Kate Wittman, SW Accountants & Advisors
Tuesday 15 April 7.30-9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 3: Personal services income guidelines** Many practitioners mistakenly believe that if the personal services income (“PSI”) tests are passed and the PSI regime has no application, then that is the end of your analysis and no further research is required. However, in draft PCG 2024/D2 we are once again reminded that the Commissioner is of the view that the general anti-avoidance provisions of Part IVA may still apply to tax income to a single individual in circumstances where the PSI tests are passed. That is, Part IVA may still apply to the alienation of PSI that falls outside of the PSI regime. This presentation will include: • Detailed examination of draft PCG 2024/D2 • The Commissioner’s traffic lights approach; and • Real-life practical examples.	**Speaker:** Vanessa Priest, FTI, SW Accountants & Advisors **Tax update presenter:** Dwayne Pereira, EY

Tuesday **13 May** 7.30-9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 4: Year-end tax planning** This session will go through top tips to get ahead of common year-end tax planning issues, including: • Trust deeds, trust distributions and communicating with beneficiaries • Dividend documentation; and • Division 7A, including set-offs.	**Speaker:** Adam Dimac, Hall & Wilcox Lawyers
Tuesday **17 June** 7.30-9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 5: Trustee resolutions** This session will provide a practical and time update on key issues with trustee resolution. With the ATO placing considerably more focus on the validity of trustee decision making, it has never been more important to get trustee resolutions right.	**Speaker:** Matthew McKee, FTI, Brown Wright Stein Lawyers **Tax update presenter:** Hayden Rudd, Brown Wright Stein Lawyers
Tuesday **15 July** 7.30-9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 6: State Taxes – Land Tax** This session will focus on the proposed changes to the principal place of residence exemption that are effective from 1 December 2024 but will also consider other key risks and quirks with the PPR exemption.	**Speaker:** Steve Paterson, FTI, Deloitte **Tax update presenter:** Luke Raams, Hall & Wilcox Lawyers
Tuesday **19 August** 7.30-9:00am AEST Hall & Wilcox Level 18/347 Kent St Sydney	**Part 7: Divorce and separation tax** This session will consider the family law issues and tax implications which arise from the breakdown of relationships. We will explore key family law concepts such as the division of assets, spousal maintenance and child support, highlighting how these factors can influence tax obligations and entitlements. We will address the potential tax implications related to property settlements, including: • The division of family discretionary trusts • Capital gains tax consequences • Division 7A implications • Superannuation splits • Family trust elections • Company losses and continuity of ownership • Undrawn UPE's; and • Duty consequences.	**Speakers:** Eleanor Lau, Lander & Rogers Jane Harris, CTA, Brown Wright Stein Lawyers **Tax update presenter:** Aritree Barua, Brown Wright Stein Lawyers

Tuesday
16 September
7.30-9:00am AEST
Hall & Wilcox
Level 18/347 Kent St
Sydney

Part 8: Business separations

This session will consider the tax implications of separating business and asset interests, in relation to both companies and unit trusts, where the owners wish to go their separate ways. It will consider the options available, including where there will be owners who wish to continue to own and operate the business.

The session will include:

- Share buyback/unit redemption versus share transfer/unit transfer; and
- consideration of where the entity has retained profits and/or unrealised capital gains and how this may impact on the choices being made.

Speaker:
Jake Berger, ATI, Pitcher Partners
Tax update presenter:
Anjali Mohan, EY

Tuesday
14 October
7.30-9:00am AEDT
Hall & Wilcox
Level 18/347 Kent St
Sydney

Part 9: To be announced

One thing that we know is certain with tax, is that it's an ever-changing environment and one that practitioners need to constantly be on top of. Whilst we'd love a crystal ball, we can't yet predict what may be on our radars at the tail end of 2024.

Watch this space for our program updates in 2025!

Speaker:
To be announced
Tax update presenter:
To be announced

Tuesday
18 November

7.30-9:00am AEDT
Hall & Wilcox
Level 18/347 Kent St
Sydney

Part 10: To be announced

One thing that we know is certain with tax, is that it's an ever-changing environment and one that practitioners need to constantly be on top of. Whilst we'd love a crystal ball, we can't yet predict what may be on our radars at the tail end of 2024.

Watch this space for our program updates in 2025!

Speaker:
To be announced
Tax update presenter:
To be announced

Presenters

Debra Anderson is a registered tax practitioner with extensive experience as a BAS agent and tax agent. She is a Fellow of the Institute of Public Accountants, and a member of the Australian Institute of Company Directors and the National Tax and Accountants' Association. She specialises in tax and technology for small business, has a Master of Business Administration and has worked extensively with the Australian Taxation Office on matters relating to tax practitioners and small business.

Aritree Barua is a Senior Lawyer in the tax team at Brown Wright Stein Lawyers. She completed a Bachelor of Commerce, a Bachelor of Laws and a Master of Laws (with a focus on taxation law) at the University of Sydney and is an admitted solicitor of the Supreme Court of NSW and the High Court of Australia. With prior experience in tax accounting, Aritree developed a wealth of knowledge in tax and commercial law matters. Aritree's experience includes preparing tax advices, private ruling applications and responses for tax audits.

Jake Berger, ATI, is a Partner within the Pitcher Partners Private Business and Family Advisory team. Jake specialises on the provision of tax advisory services to his clients and other clients of the group on a wide variety of matters. Jake is a Chartered Accountant with a Masters of Tax from the University of Sydney.

Graeme Colley is a well-known figure in the SMSF community with a longstanding reputation as an accomplished educator, technical expert and advocate for the sector. He brings over 30 years of taxation and superannuation experience gained from senior positions in the private and public sectors. He is currently involved with the Australian Graduate School of Management at the UNSW and is the Ambassador of the Auditors' Institute. Graeme is also a joint author of the CCH Master Financial Planning Guide and Financial Planning in Australia published by LexisNexis.

Adam Dimac is an experienced tax lawyer, and advises clients on a range of matters including tax planning and structuring, Division 7A, the small business CGT concessions, corporate restructuring, professional firm structures, trust taxation, the taxation of settlements and cryptocurrency taxation. Adam regularly acts for taxpayers in dispute and controversy matters, and provides assistance with ATO reviews and audits.

Jane Harris, CTA, is a Senior Associate at Brown Wright Stein Lawyers with over 15 years of experience assisting high net wealth and SME clients with taxation matters. With a background in accounting and business services, Jane provides tax and commercial advice to accountants, small to medium enterprises and private clients. Jane is an admitted Solicitor of the Supreme Court of NSW and holds Bachelor of Commerce, Bachelor of Arts, Juris Doctor and Master of Law degrees from the University of Sydney.

Eleanor Lau is a Partner at Lander & Rogers, and an Accredited Family Law Specialist who practises exclusively in Family & Relationship Law. Eleanor has assisted clients in all areas of family law including property settlement, spousal maintenance, parenting matters, child support, financial agreements and matters involving international issues. Eleanor is well-versed in advising clients across the spectrum of family law issues with particular expertise on financial matters involving complex structures such as trusts, companies and partnerships, including where assets are held both within Australia and overseas. Eleanor is also experienced in complex parenting matters, particularly in cases where an overseas element is involved. Eleanor is a member of the NSW Law Society Specialist Accreditation Family Law Advisory Committee, a member of LawAsia, and a fellow of the International Academy of Family Lawyers (IAFL). She has been recognised in the Doyle's Guide as a Leading Family & Divorce Lawyer both in NSW and nationally across Australia. Eleanor is one of only a small number of Cantonese and Mandarin speaking family lawyers in NSW whom have attained specialist accreditation in Family Law.

Matthew McKee, FTI, is a Partner of the Sydney law firm Brown Wright Stein Lawyers. Matthew assists accountants and lawyers in advising their clients on all aspects of tax and superannuation for SMEs and high-net-wealth individuals and family groups.

Steven Paterson, FTI, is a partner in Deloitte's State Taxes team and has over 22 years of experience in advising on state taxes (particularly stamp duty, land tax and foreign surcharges) in every Australian jurisdiction. Over his career, Steven has been involved with numerous

"The Local Tax Club is the perfect blend of professional development and community connection. The monthly breakfast is a great way to start the day, networking with other tax professionals while gaining valuable knowledge and keeping informed about the latest in tax. Tax Practitioners should not miss out on the opportunity to attend these informative sessions"

Anna Rizzo, Demasi & Company

For event queries please contact the Events Team: NSW@taxinstitute.com.au major transactions in Australia and gained a working knowledge of some of the most unique and complex business and transaction structuring. He is able to use this knowledge in the ever-changing tax and stamp duty landscape. Steven has published numerous bulletins and other publications on the changes to indirect tax legislation as well as interpretation and practice and have been called upon to provide expert comments in the general media. Steven sits on a number of professional liaison committees and also provides strategic guidance and direction for peak industry groups.

Dwayne Pereira is a Senior Manager in the Global Compliance & Reporting (Corporate Tax) team of EY in Sydney. Dwayne has more than 10 years' experience in providing corporate tax compliance and advisory services to domestic and multinational clients. Dwayne has a speciality in the life sciences and primary health industry.

Vanessa Priest, FTI, of SW Accountants & Advisers has more than 25 years' experience as a tax specialist and has a particular interest in the tax and succession issues faced by privately owned enterprises and family groups. She has extensive knowledge in areas such as tax structuring, cross border issues, asset acquisitions and divestments, and tax issues arising for trusts. She has written and presented many papers for key professional associations, such as The Tax Institute, the Institute of Chartered Accountants in Australia, the Television Education Network, and Company Secretaries of Australia. Vanessa was a partner at Deloitte Private and prior to that was a partner at BDO and Crowe Horwath. Vanessa is a Chartered Accountant and has degrees in Teaching, Commerce (majoring in Accounting and Economics) and a Masters in Tax Law. She is a Fellow of the Taxation Institute of Australia, a member of Tax Discussion Group No. 14 and the Challis Group. She is currently a member of the State Council for The Tax Institute.

Hayden Rudd, CTA, is a Senior Lawyer at Brown Wright Stein Lawyers. Hayden's practice includes a mix of tax and commercial work. Hayden's experience includes preparing applications for private rulings, objections and liaising on behalf of clients with both the Australian Taxation Office and Revenue NSW.

Bradley White is a senior associate in Hall & Wilcox's Tax team, with a specialisation in state tax-based matters, advising clients nation-wide. Bradley assists clients with their tax structuring, tax controversy, and tax planning needs, and has both federal and state tax expertise. Bradley has particular experience engaging with different state and territory revenue authorities on behalf of clients and objecting to, or applying for, exemptions with respect to land tax, duty and payroll tax issues. Bradley's clients are predominantly small-to-medium businesses and high net-worth family groups, with a focus on the property development, agriculture, not-for-profit and health sectors.

Kate Wittman of SW Accountants and Advisors has over 6-years' experience in tax. She began her career in the US with PwC in their International Tax Services team and also holds a US CPA license. In 2021 she permanently moved to Australia and has building her knowledge and experience of the Australian tax system. Her areas of interest include: trusts, tax structuring and international tax issues.

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:

Individual	Member	New Member*	Non-member
Single Session	☐ $100	☐ $490	☐ $150
5 Pack	☐ $350	☐ $740	☐ $500
Full Series 10 Pack	☐ $700	☐ $1090	☐ $1000
Company Subscription	☐ $850		

Please select your session/s:

☐ Tues, 18 Feb 44430	☐ Tues, 18 Mar 44431	☐ Tues, 15 Apr 44432	☐ Tues, 13 May 44433	☐ Tues, 17 Jun 44434
☐ Tues, 15 Jul 44435	☐ Tues, 19 Aug 44436	☐ Tues, 16 Sept 44437	☐ Tues, 14 Oct 44438	☐ Tues, 18 Nov 44439

Dietary requirements:

Promotional code:

***Become a member and save!**

Not a member of The Tax Institute yet?
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.

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

JOIN TODAY

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

44302 | WD

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:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

To register **Email** customeradmin@taxinstitute.com.au **Mail** Level 21, 60 Margaret Street, Sydney NSW 2000 **Online** Local Tax Club - Sydney CBD