The Tax Institute

Local Tax Club Toowoomba

March – November 2025

Power Tynan, Toowoomba

1.5 CPD hours / session

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.

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.

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

25 March – 25 November 2025

1.5 CPD hours / session

Power Tynan, Toowoomba

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.

Technical Program

Date/Time	Session	Presenter
Tuesday, 25 March 7:30–9:00am AEST Power Tynan, 6/618 Ruthven St, Toowoomba City QLD 4350	**Part 1: Small business CGT concessions** This session will provide an overview of the common mistakes, tips and traps that practitioners often face when advising on the small business CGT concessions. In this session we will explore: • Eligibility for active assets (e.g. farms or commercial property used in business originally and then sold after leasing for a long period of time) • CGT concessions for succession and the term ‘in connection with your retirement’ when looking at eligibility; and • Other common pitfalls and where practitioners may get it wrong.	Jodie Robinson, CTA, McCullough Robertson
Tuesday, 13 May 7:30–9:00am AEST Power Tynan, 6/618 Ruthven St, Toowoomba City QLD 4350	**Part 2: Intergenerational Wealth Transfers and Family Group Disputes** As family dynamics evolve and wealth is passed from one generation to the next, the complexities of succession planning and intergenerational wealth transfers grow. This session delves into the complexities of transferring wealth across generations and resolving disputes within family groups. It highlights strategies for ensuring smooth transitions, minimising risks, and fostering long-term stability. Key topics include: • Bank of Mum and Dad: Risks of undue influence in financial support arrangements and the importance of clear documentation • Investment Structures: Innovative investment structures, such as companies with trust shareholders, to prepare for generational shifts • Loans and UPEs: Cleaning up loans and unpaid present entitlements (UPEs) in trusts to avoid complication • Testamentary Trusts: Tax and asset protection benefits of testamentary trusts • Wealth Transfers: Using deeds of family arrangement to formalise wealth transfers and document transitions effectively • Division 296 Tax: Navigating Division 296 tax implications, including potential risks of forced asset liquidation; and • Strategies for Managing Family Group Disputes: Encouraging collaborative discussions to resolve tensions, leveraging family structures, addressing the role of advisors in avoiding conflict and maintaining objectivity, addressing increasing scrutiny and challenges faced by trustees from beneficiaries.	Neal Dallas, CTA, BusinessDEPOT Victoria Mercer, BusinessDEPOT

Tuesday, 22 July ***11:00am – 1:00pm AEST** Power Tynan, 6/618 Ruthven St, Toowoomba City QLD 4350	**Part 3: Family Law and Tax** With client structures becoming increasingly complex it is common for advisers, both legal and accounting, to encounter problems. This session will discuss some of the common issues that practitioners encounter. *** Please note that this session is being held from 11:00am and not 7:30am ***	Wendy Miller, CTA, Damien Greer
Tuesday, 7 October **7:30–9:30am AEST** Power Tynan, 6/618 Ruthven St, Toowoomba City QLD 4350	**Part 4: Family Trust Elections – The complexities in making and managing an FTE** The rules about family trust elections, in particular who is part of the 'family group' and what are 'distributions', are quite complex and commonly misunderstood. A proper understanding of these rules is critical because distributions outside of the 'family group' could result in the family trust distribution tax being triggered. Family trust distribution tax, if triggered, is a debt that is not subject to a review period and for which the entity (which makes the distribution), together with the individuals who are directors or trustees, can be jointly liable. Therefore, it is important that advisers understand the concepts of 'family group' and 'distributions'. **In this special two-hour session, Linda will cover:** • What are the implications of making a FTE or IEE • When is a FTE or IEE required • Requirement to make a valid FTE or IEE (including issues for testamentary trusts in meeting the 'family control' test) • What are 'distributions' • Which individuals and entities are part of the 'family group' • Who is liable for FTDT • What should the trust deed say to help with these issues; and • Passing control of trusts to the next generation	Linda Tapiolas, CTA Cooper Grace Ward Lawyers

Tuesday, 25 November 7:30–9:00am AEST Power Tynan, 6/618 Ruthven St, Toowoomba City QLD 4350	**Part 5: Payroll tax audit issues – Grouping and contractors** This session will dive into the ongoing interpretational issues and practical challenges when dealing with common payroll tax audit issues – grouping, contractors and employment agency provisions.	DJ Alexander, CTA, QLD Bar

Presenters

DJ Alexander, CTA, is a barrister at QLD Bar. He advises on all taxes, with a focus on assisting clients manage ATO, QRO and ACNC audits, objections, litigation and rulings. DJ also frequently provides specialist tax opinions in various contexts such as family law property settlements, deceased estates and liquidations.

Neal Dallas, CTA is the Legal Director at BusinessDEPOT. He has extensive experience advising clients in the areas of superannuation, tax, estate planning and asset protection. He is recognised in the 2025 Edition of Best Lawyers in Australia in the areas of Superannuation Law, Tax Law, Trusts and Estates, and Wealth Management/Succession Planning Practice.

Victoria Mercer is an Associate Lawyer in the Wealth Advisory Division at businessDEPOT (Legal), specialising in complex estate planning, self-managed superannuation, and strategic tax planning. Her practice focuses on serving high net worth individuals, business owners and blended families. Victoria distinguished herself academically by earning the title of Dux in her Advanced Superannuation during her Graduate Diploma of Applied Tax at the Tax Institute in 2023. In 2022, Victoria was nominated as a 'Rising Star' in the Queensland Wills and Estates Law category for the leading industry publication Doyle's Guide and regularly presents at industry conference including the SMSF Association, Legalwise and The Tax Institute. As a trusted advisor, Victoria relishes the opportunity to tackle complex family dynamics and structures, helping families transition their wealth to the next generation.

Wendy Miller, CTA Wendy is a highly experienced accredited family law specialist and an accredited family law arbitrator. Her strong preference is to assist clients settle their family law issues in a conciliatory manner through negotiation, mediation, arbitration or through the collaborative law process. However, if litigation is necessary Wendy will take immediate action to protect her client's position.

Much of Wendy's work is with financial agreements and the often difficult corporate, trust and tax issues that arise in family law. She also has an interest in contributing the family law component to business and family succession planning.

Wendy is adept at problem solving and strategic thinking to achieve the best outcome for her clients. They can also rely on her to be responsive and easily accessible and rely on her support during those times of high anxiety and stress.

Jodie Robinson, CTA is an Accredited Tax Law Specialist and Special Counsel in the tax team with McCullough Robertson Lawyers. Jodie is passionate about providing clients with results-driven, commercial advice and solutions for their taxation and business needs. Jodie regularly advises on the tax consequences of the sale of significant businesses, business restructures, including applicable rollovers and duty exemptions, and holding

" The Local Tax Club is a great opportunity to understand not only the technical issues, but also how other professionals are dealing with the issues both practically and commercially

Michelle Hartman, CTA

For event queries please contact
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company interpositions. Jodie also assists clients and their advisors in obtaining private binding rulings and dealing with payroll tax self-review audits.

Linda Tapiolas, CTA, is a Partner in the Cooper Grace Ward Lawyers Commercial team. She provides a range of support services to accountants, financial planners, and other professional advisers. This includes technical advice on complex tax, CGT and Div 7A issues, as well as acting on business sales and acquisitions to ensure clients achieve commercial and tax-effective outcomes. Prior to joining Cooper Grace Ward, Linda worked as an accountant for 18 years advising clients on capital gains, business acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions.

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 registration	☐ $350	☐ $350	☐ $500
Single session registration	☐ $100	☐ $100	☐ $150

Please select your session/s:

☐ Tue, 25 Mar 44232 ☐ Tue, 13 May 44233 ☐ **Tue, 29 July 44234** ☐ Tue, 7 Oct 44235 ☐ Tue, 25 Nov 44236

Dietary requirements:

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2 Delegate contact details

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

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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)

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