

Local Tax Club Townsville

March – November 2025

The Balcony, Townsville

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

27 March – 27 November 2025

1.5 CPD hour / session

The Balcony, Townsville

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
Thursday, 27 March 8:00 –9:00am AEST The Balcony Restaurant 287 Flinders Street, Townsville City	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: <ul style="list-style-type: none"> • 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. 	David Hall, CTA, Findex
Thursday, 15 May 8:00 –9:00am AEST Findex, Level 5/22 Walker Street, Townsville	Part 2: Succession Planning Administration of a deceased estate involves addressing various and ever-changing legal and tax complexities. As a skilled practitioner it is important now more than ever with an aging population that succession planning is at the forefront of your clients mind. This session will provide an overview of what you need to be aware of in terms of life interests and administering complex deceased estates whether dealing with a family farm or a business.	David Hall, CTA, Findex
Thursday, 24 July 8:00 –9:00am AEST The Balcony Restaurant 287 Flinders Street, Townsville City	Part 3: Restructuring – The rollovers available A practical walk through of a number of the rollovers available for restructuring a business covering CGT, Income tax and transfer duty. This session will consider the sign posts, pitfalls and opportunities.	David Hall, CTA, Findex

Thursday, 9 October

8:00 –9:00am AEST
The Balcony Restaurant
287 Flinders Street,
Townsville City

Part 4: Div 7A

Division 7A continues to evolve with the withdrawal in 2022 of several previous ATO guidance materials. This session will focus on practical issues that arise in applying Div 7A including:

- Division 7A and foreign companies
- Looking beyond retained earnings
- How to determine a company's distributable surplus
- When is a repayment really a repayment?
- Consequences of forgiving loans or UPE's; and
- A wrap-up on everything we know about Bendel.

David Hall, CTA, Findex

**Thursday, 27
November**

8:00 –9:00am AEST
The Balcony Restaurant
287 Flinders Street,
Townsville City

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.

David Hall, CTA, Findex

Presenters

David Hall, CTA, is a Tax Partner at Findex and Crowe Australia based in Townsville. David regularly advises on restructures, succession arrangements, and business sales and acquisitions to ensure clients achieve their personal aims and tax-effective outcomes. David is an expert on the small business CGT concessions and the agri-sector, and regularly deals with a large number of the firm's agri-clients and as such has extensive experience in dealing with the tax consequences of the changing landscape for agri clients and the use of their land. David has over forty years' of experience advising in the private wealth space primarily SBEs in the agricultural and ag-supply industries.

“ 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
Harmony Fletcher**
harmonyfletcher@taxinstitute.com.au
+61 07 3225 5209

Register now!



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purchase your tickets!



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	<input type="checkbox"/> \$350	<input type="checkbox"/> \$350	<input type="checkbox"/> \$500
Single session registration	<input type="checkbox"/> \$100	<input type="checkbox"/> \$100	<input type="checkbox"/> \$150

Please select your session/s:

☐ Thu, 27 March 44244
 ☐ Thu, 15 May 44245
 ☐ Thu, 24 July 44246
 ☐ Thu, 9 Oct 44247
 ☐ Thu, 25 Nov 44248

Dietary requirements:

Promotional code:

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- access all member-only technical resources.

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2 Delegate contact details

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3 Payment method

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