The Tax Institute

Regional Masterclass

9–10 October 2025

Mineral Springs Hotel & Online

10 CPD hours

The Tax Institute gratefully acknowledges the generous assistance of members of the Organising Committee:

Frederick Mahar, CTA, FM Mahar & Associates (Co-Chair)
Karen Goodfellow, CTA, Goodfellow Tax Advisory (Co-Chair)
Daniel Angelovich, FTI, Forvis Mazars
Alexander Dounis, CTA, Findex
David Hall, CTA, Findex
Laura Hussey, ATI, KHQ Lawyers
Robert, Warnock, CTA, Sladen Legal
Paul Wastell, Wastell Bookkeeping and Tax Services

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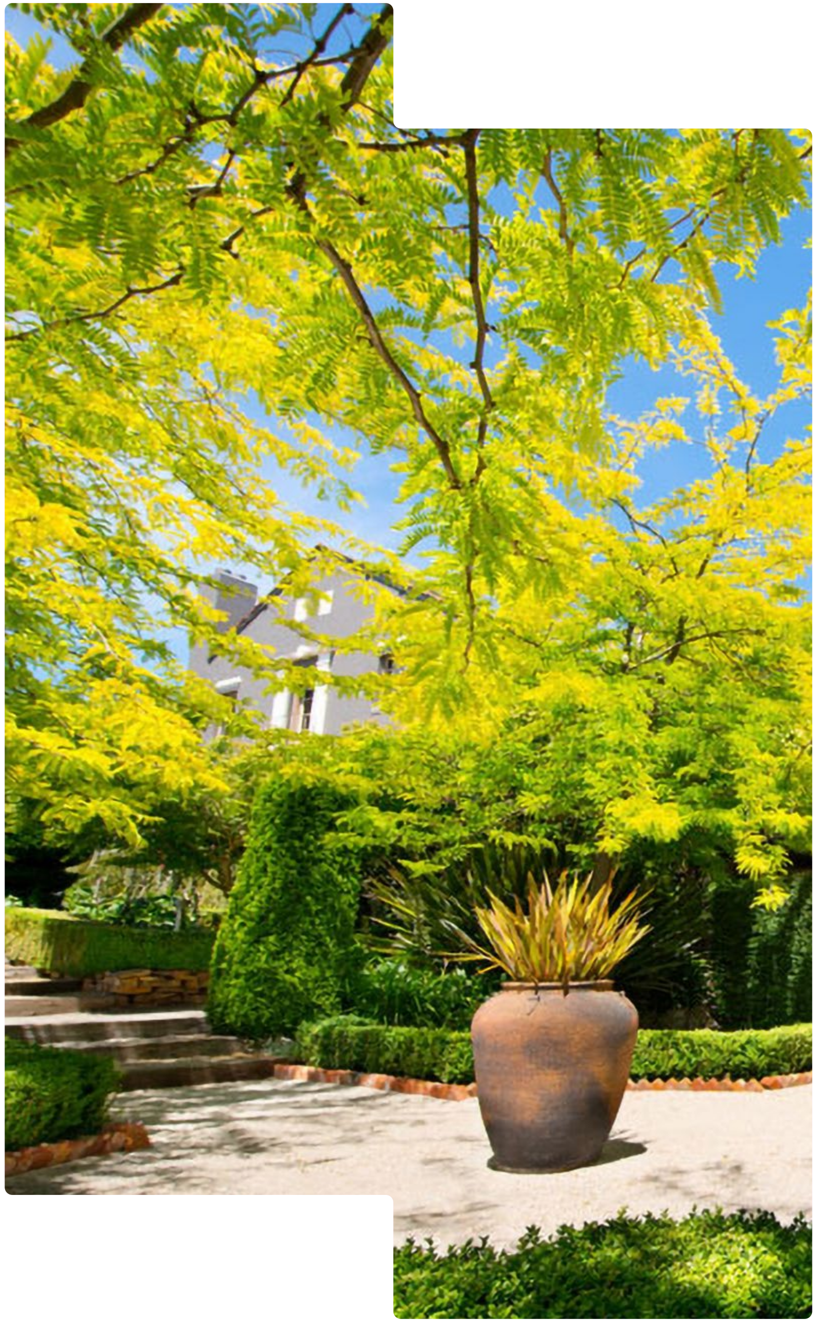


Welcome

Practical Tax Insights for Regional and Remote Practitioners

We are excited to invite you to the Regional Masterclass – with a refreshed event format designed with regional tax practitioners front of mind.

Set against the picturesque backdrop of Daylesford, Victoria, this 1.5-day masterclass will deliver 10 CPD hours packed with practical, relevant and timely insights. The program has been carefully developed to explore key technical issues and challenges facing regional practitioners today.

We're proud to be bringing this initiative to life, and we thank our speakers and panellists for their time and expertise in shaping a highly engaging agenda. A special thanks also to the organising committee, whose efforts have made this event possible.

If you're looking to grow your technical knowledge, stay across emerging developments, and connect with like-minded peers in a relaxed and inspiring regional setting, we'd love to see you there.

Come join us for the 2025 Regional Masterclass — we're sure you'll find it a rewarding and enjoyable experience.

Frederick Mahar, CTA, FM Mahar and Associates
Co-Chair, Masterclass Organising Committee

Karen Goodfellow, CTA, Goodfellow Tax Advisory
Co-Chair, Masterclass Organising Committee

Early bird pricing offer
Register on or before Friday, 12 September 2025 to save!

Technical program

Day 1 Thursday, 9 October 2025

Time *AEDT	Session
9:30 – 9:50am	**Registration and Morning tea**
9:50 – 10:00am	**Welcome and opening address** Speaker: Frederick Mahar, Co-chair, Organising Committee
10:00 – 11: 00am	**Session 1: Regional realities – SMSF strategies for land, business and beyond** Speaker: Bryce Figot, CTA, DBA Lawyers For regional clients, SMSFs are often central to long-term planning—whether tied to business premises, rural landholdings, or growing interest in renewable infrastructure like wind and solar projects. This session provides a broad, practical exploration of SMSF strategies relevant to regional practitioners and explores how SMSFs can support regional clients across a range of scenarios—from in-specie contributions of business or land assets to renewable infrastructure projects. This session covers CC/NCC strategies, proposed Division 296 implications, and compliance risks linked to development activity, offering practical guidance for advisers helping clients align their super strategies with broader regional business and investment goals.
11:00am – 12:00pm	**Session 2: Navigating land tax, VRLT and intergenerational duty exemptions** Speaker: Rachel O'Donnell, CTA, O'Donnell Tax Law This session will discuss recent developments and topical issues in Victorian property taxes relevant to regional practitioners, including 'primary production land' exemptions from land tax, the Vacant Residential Land Tax (VRLT), and intergenerational duty exemptions for transfers of primary production land. Participants will also receive an overview of the Windfall Gains Tax (WGT) now that it has been in place for a couple of years. This session will discuss live, practical issues, providing delegates with insights to help clients manage compliance and plan effectively across multiple state tax regimes.

Technical program

Day 1 Thursday, 9 October 2025 continued

Time *AEDT	Session
12:00 – 1:00pm	**Lunch**
1:00 – 2:00pm	**Session 3: Distressed businesses and liquidation – Restructure or liquidate? practical planning for regional practitioners** Speakers: Scott Anderson, Worrells, Laura Hussey, ATI, KHQ Lawyers When a regional business faces financial distress, deciding whether to restructure or liquidate is critical. This session explores practical considerations, legal and tax implications, and strategic planning options available to advisers supporting distressed clients. Attendees will learn how to evaluate restructuring alternatives, understand liquidation processes, and implement planning strategies that can preserve value and mitigate risks in challenging circumstances.
2:00 – 3:00pm	**Session 4: Cultivating tomorrow – Embracing innovation in regional businesses** Speaker: Adam Mallabone, CTA, DLK Advisory Technological innovation is reshaping regional industries—from agriculture and manufacturing to renewable energy and beyond. This session explores key advancements including research and development activities, automation, and emerging scientific breakthroughs. Advisers will gain insights into how these innovations impact tax planning, incentive opportunities, capital investment decisions, and compliance considerations across diverse regional sectors. Designed for practitioners supporting regional clients, this session offers practical guidance to navigate and capitalise on the evolving technological landscape.
3:00 – 3:30pm	**Afternoon tea**
3:30 – 4:30pm	**Session 5: Irregular receipts, water rights, and compulsory acquisitions – Tax implications for regional clients** Speaker: David Hall, CTA, Findex This session explores tax issues arising from irregular receipts tied to agricultural assets, including water rights, TARP considerations, and associated rights such as gravel, soil, and biodiversity credits. It also addresses federal and state compulsory acquisitions of agricultural land, focusing on the application of CGT relief, small business concessions, and valuation challenges—particularly in regions affected by wind farm developments. Designed for practitioners advising on complex rural asset transactions, this session will provide practical insights into navigating tax and valuation complexities in evolving regional landscapes.

Technical program

Day 1 Thursday, 9 October 2025 continued

Time *AEDT	Session
4:30 – 5:30pm	**Session 6: Preparing for change: The ATO's next 5000 agribusiness reviews and what they mean for regional practitioners** Speaker: Greg Nielsen, Pitcher Partners The ATO's upcoming wave of 5,000 reviews targeting the agribusiness sector signals heightened scrutiny and evolving compliance expectations. This session equips rural tax practitioners with insights into the ATO's focus areas, governance standards, and the shifting landscape of risk management. Attendees will learn how to proactively advise clients, manage potential disputes, and reinforce governance frameworks to align with government expectations. This session underscores the critical role tax advisors play in navigating regulatory change and safeguarding agribusiness clients' compliance and reputation.
5:30 – 7:30pm	**Networking function**

Networking function

Join your colleagues and our esteemed speakers for an evening of drinks, canapes and networking.

Date: Thursday, 9 October 2025

Time: 5:30–7:30pm

Venue: Mineral Springs Hotel

Price: Inclusive for all full registration delegates
Additional tickets are $80 per person, see registration form for details

Dress: Business or Business casual

Technical program

Day 2 Friday, 10 October 2025

Time *AEDT	Session
9:00am–10:00am	**Session 7: When a farmer becomes a property developer – Tax and GST implications of land subdivision** **Speaker: Neil Brydges, CTA, Sladen Legal** Over the course of ownership of a property, it's use or intention for use can change, and depending on what that change is, there can be significant income tax and GST implications that need to be addressed. This session looks at some of those changes and the tax and GST consequences that can follow, including: • Profit making schemes vs carrying on a business; • Carrying on an enterprise and the exclusion for capital assets; and • ATO guidance and court and tribunal cases on these issues.
10:00–11:00am	**Session 8: Family trust elections – When things go wrong and how to fix them** **Speaker: Leo Gouzenfiter, Pitcher Partners** Family trust elections can have significant tax consequences, but mistakes or oversights happen. This session offers a practical, preventative approach to managing family trust elections and interposed entity elections – highlighting common pitfalls, tax issues, and effective remedies when elections go wrong. Designed for practitioners advising family trusts, the discussion will provide clear strategies to avoid errors and navigate corrective options to minimise tax risks and ensure compliance.

Technical program

Day 2 Friday, 10 October 2025 continued

Time *AEDT	Session
11:00–11:30am	**Morning tea**
11:30am–12:30pm	**Session 9: Testamentary trusts – Succession planning and asset protection strategies** Speaker: Greg Russo, Greg Russo Law Building on the foundations of succession planning, this session examines the strategic use of testamentary trusts to protect assets and manage wealth transfer. Practitioners will explore how testamentary trusts can provide flexibility, tax benefits, and protection for beneficiaries, making them a valuable tool in comprehensive succession plans. Building on our earlier discussions on estate and succession planning, this session offers practical guidance for regional practitioners advising clients on estate structuring.
12:30–1:30pm	**Session 10: Navigating succession and estate planning challenges in regional practice -Panel discussion** Speakers: David Hall, CTA, Findex, Rachel Hocking, KHQ Lawyers, Alasdair Woodford, Harwood Andrews Facilitator: Gary Thomas, CTA, Gary Thomas Proprietary Succession and estate planning in regional areas requires careful navigation of tax implications, control of entities, and asset structuring—particularly when dealing with family-owned farms, small businesses, and intergenerational wealth. Through real-world examples and case studies, our panellists will highlight where plans often unravel and share practical strategies to help avoid common pitfalls. The discussion will cover a range of client scenarios, from farming operations to local businesses, providing insight into effective planning, communication, and risk management. Ideal for those advising on succession and estate matters across diverse regional client bases, this session will offer guidance you can immediately apply in practice.
1:30-2:30pm	**Masterclass closing address followed by light lunch** Speaker: Karen Goodfellow, CTA, Co-chair, Organising committee

Presenters

Neil Brydges, CTA, is a Principal in Sladen Legal's tax group. Neil primarily practises in direct taxes and GST, with a focus on the taxation of trusts, deceased estates, property, corporate tax, M&A and Division 7A. Neil has also advised extensively on cross-border taxation issues. Neil is an Accredited Specialist in Taxation Law and a member of the Tax & Revenue Law Committee with the Law Institute of Victoria, Chair of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser with The Tax Institute.

Bryce Figot, CTA, is also recognised as one of Australia's leading SMSF lawyers. He has worked predominantly in the fields of tax and superannuation since 2001 and holds a Master of Laws from the University of Melbourne. Bryce is a regular seminar presenter on tax and SMSF topics and has published extensively in these areas. Bryce regularly presents for the major professional bodies including the SMSF Association, CPA Australia, The Tax Institute, Chartered Accountants Australia and New Zealand and DBA Network. Bryce is regularly quoted and published in the Australian Financial Review, the Herald Sun, CCH and LexisNexis publications, and elsewhere in the financial press. Bryce wrote the book Complete Guide to SMSFs: Planning for Loss of Capacity and Death, published by CCH Wolters Kluwer. Bryce is on the editorial panel of LexisNexis' Australian Superannuation Law Bulletin. He is a Senior Fellow at the University of Melbourne's Law School, where he is the subject coordinator of Taxation of Superannuation. Bryce is a Specialist SMSF Advisor as well as being a Chartered Tax Adviser.

Leo Gouzenfiter is a Client Director in the National Tax team at Pitcher Partners. He focuses on a broad range of income tax issues that affect private clients and family groups in the SME market and regularly consults with the ATO and Treasury in his role. Leo commenced his career in the tax profession as a graduate in the ATO having worked in technical roles in the Tax Counsel Network and compliance roles in various business lines.

David Hall, CTA, is a Tax Partner at Findex and Crowe Australia based in Townsville. David regularly provides tax advisory services to the firm's North Queensland clients and other accounting and law firms on a large range of areas including: restructures, succession arrangements, business and property sales and acquisitions to ensure clients achieve their personal aims and tax-effective outcomes. David has over 40 years' experience is an expert on the small business CGT concessions and the agri-sector and regularly deals with a large number of agri-clients through both Findex and his tax consulting to other accounting and legal firms. David holds a Master of Taxation from the University of New South Wales, a Bachelor of Commerce from JCU, FCPA, Tax Agent, Chartered Tax Adviser.

Rachael Hocking is an accredited specialist in wills & estates with the Law Institute of Victoria and a Principal Solicitor at KHQ Lawyers. Rachael is also a full member of the International Society of Trust and Estate Practitioners (STEP). As well as practising law, Rachael is a mentor and lecturer with the College of Law (Victoria) in their LLM (Applied Law) program in the wills and estates major. Rachael acts in all areas of wills and estates including estate planning, administration and litigation and is actively involved in trust, superannuation and family advice and disputes.

Laura Hussey, ATI, is a Senior Associate at KHQ Lawyers in the Tax and Structuring Team. Laura's principal areas of practice include federal and state tax, structuring and restructuring, business and personal succession planning, tax disputes, trust law and the taxation of crypto assets. Laura has experience in both Australia and the United Kingdom and works an array of clients from family-owned businesses to large multinational corporations. Laura has a wealth of experience across a variety of industries and is a trusted advisor and advocate for her clients. Laura is a member of The Tax Institute's VIC State Council, Trusts Intensive Committee, Local Tax Club Committee and is Chair of the SME Stream for the VIC Annual Tax Forum.

Rachel O'Donnell, CTA, of O'Donnell Tax Law, specialises in duties and land tax across all Australian states and territories, new state property taxes (such as the Victorian windfall gains tax and commercial and industrial property tax) and GST. Rachel has significant experience advising large listed and unlisted corporates, high net worth individuals and small to medium enterprises. With 20 years of experience advising on tax law,

Presenters

she has a broad range and depth of experiences and is very familiar with the operation and technicalities of the GST and various state and territory tax regimes, which are constantly evolving. Rachel's clients have included major international and national companies / trusts / groups in the property development, property funds management, infrastructure, superannuation, and retirement living / aged care industries, as well as high net wealth family groups.

Greg Russo has almost 30 years' experience in succession planning, administration and litigation and is one of Victoria's most experienced and respected succession law solicitors. With a background in pure mathematics, Greg not only understands the implications of planning decisions on future taxation, SMSF, trust and estate administration, he is also able to break down complex concepts and structures logically and explain options to clients in a way that empowers them to take positive action and ownership for their decisions. Using the knowledge and insights that he has acquired over three decades, he crafts unique solutions to complex succession problems. Greg teaches both mathematics and law, regularly presents CPD succession events to solicitors, accountants and other professionals in Victoria, Queensland, and online. Greg is an LIV Wills & Estates Accredited Specialist, a chairperson of the LIV Specialist Accreditation Education Advisory Committee, a board member of the Mount Eliza Community Bank, a member of STEP, and is recognised in Doyle's Guide, in Victoria, as a Leading Wills and Estates Litigation Lawyer and a Leading Wills, Estates and Succession Planning Lawyer.

Gary Thomas, CTA, is the principal of Gary Thomas Proprietary Limited, a specialist tax advisory firm. His clients are other accounting firms and legal practitioners who regularly refer their client matters to him for advice or opinions. Gary has been in practice for over 40 years, predominantly in the private group space with a focus on businesses and families in regional Australia. Gary has a particular interest in trusts and estates, along with management of tax controversies.

Venue and accommodation

Mineral Springs Hotel

124 Main Road, Hepburn Springs VIC 3461

Located in the idyllic village of Hepburn springs, set in the Picturesque Daylesford and Macedon ranges, in the heart of Victoria's Spa Country. Originally built in 1935, the Mineral Springs Hotel has evolved into a romantically elegant boutique hotel, restaurant and spa offering accommodation to visitors of Daylesford & Hepburn Springs for over 75 years. The Mineral Springs Hotel is surrounded by picturesque gardens; most spectacular are the formal Italian gardens, complete with a manicured miniature hedge maze. Elegant public spaces designed by Stuart Rattle feature bespoke fittings and furniture, polished wood, marble, parchment lighting and leather accenting original 1930's feature detailing.

Getting there

Just over an hour's drive from Melbourne, Hepburn Springs is nestled amongst the Macedon Ranges offering a picturesque setting of Australian forests with fresh mountain air.

Parking

Mineral Springs Hotel has free parking available for masterclass guests.

Accommodation

An elegant portfolio of accommodation room types ranging from traditional hotel style rooms to one-, two- and four-bedroom self-contained villas are available for guests. A corporate has been negotiated with Mineral Springs Hotel. Please call 3 5348 2202 or email stay@mineralspringshotel.com.au and quote "The Tax Institute" to secure your booking.

Relaxation – The Mineral Spa

An idyllic restorative haven set in the heart of Victoria's spa country. Rejuvenating massage and body treatments, relaxing mineral spa bathing.

The Mineral Spa is our acclaimed day spa located on the grounds of the Mineral Springs Hotel in Hepburn Springs.

Guests can enjoy the highly awarded mineral water Retreat, a relaxing indoor/outdoor haven with steam room, lavender sauna, detox box, outdoor sun deck, two outdoor mineral water spas and cold plunge pool. Guests of The Mineral Springs Hotel can choose individual treatments from the spa menu or opt for one of the spa packages.

Event information

Confirmation of registration

Please note you will receive two separate emails in the form of a tax invoice at the time of payment and a confirmation email at registration completion.

Continuing Professional Development (CPD)

Attendance at the conference counts for 10 hours of CPD with The Tax Institute.

The Tax Institute's attendee hub

This event will be accessible to all delegates via our dedicated attendee hub. Program information, materials (technical papers and presentations), survey forms and more will be available via The Tax Institute's virtual attendee hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the attendee hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual attendee hub by email.

Delegate list

A delegate list will be included on the attendee hub to assist with networking. Please indicate at the time of registration if you do not want your name to be included. Alternatively, you can edit your profile visibility settings in the virtual attendee hub at any time during the event.

Dress code

Business or business casual attire is suitable for the duration of the conference.

Networking function

Thursday, 9 October 2025
The networking function will be held onsite at Mineral Springs Hotel. The networking function is included in the event registration fee for delegates, and additional tickets can be purchased for accompanying persons and guests at a cost of $80.

Special dietary and accessibility requirements

Please indicate any special dietary requirements at the time of registration. Please email us with any accessibility requirements at nationalevents@taxinstitute.com.au.

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

Privacy

We take your privacy seriously, and our policy can be viewed at: https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer.

Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or nationalevents@taxinstitute.com.au.

For registration enquiries, please contact customeradmin@taxinstitute.com.au.

Registration

Registration inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ lunches	Networking function*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Online Full Registration This registration option entitles one delegate to attend he entire event virtually	✓		

*Additional tickets to the Networking functions can be purchased on the registration form

Discounts

Early bird registration

All registrations received and paid on or before Friday, 12 September will be entitled to an early bird discount.

Please note: The registration fee does not include accommodation, hotel incidentals or transfers.

Group discounts

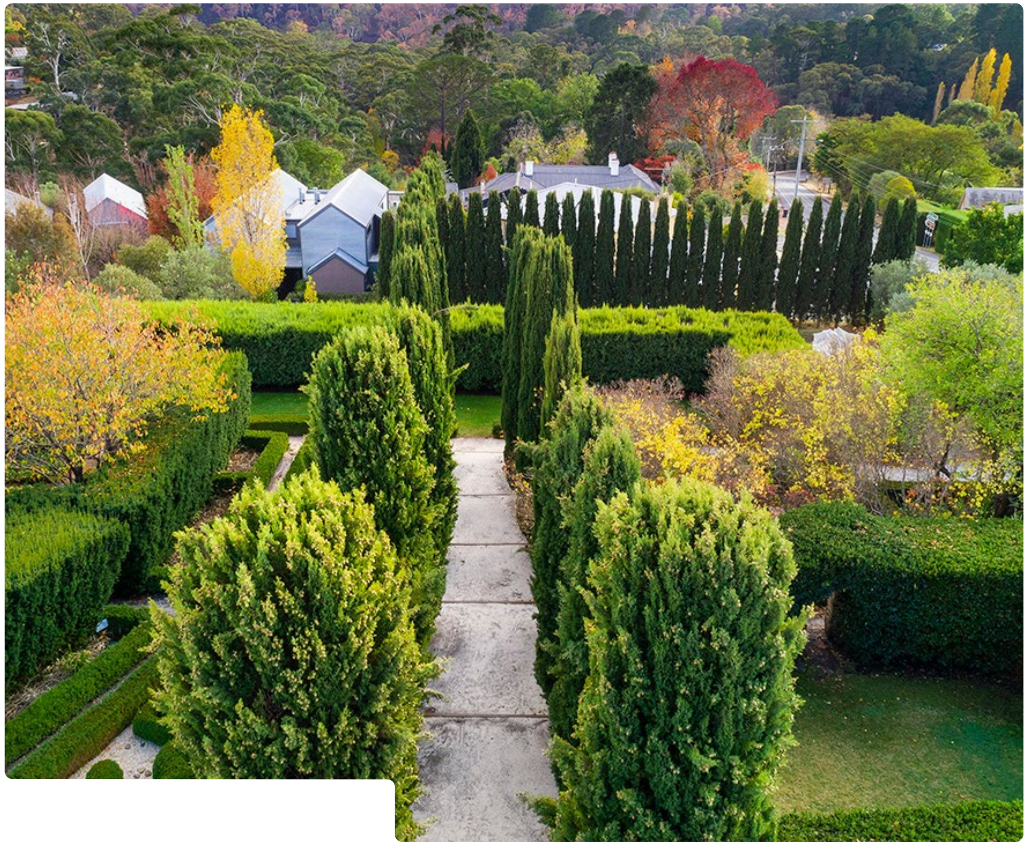
Purchase three full registrations (early bird or standard) and receive a fourth full registration for free. The free fourth registration must be of equal or of less value to the three paid registrations.

This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

Register now!

Register online ▶

Register via form ▶
included in this brochure



The Tax Institute

Regional Masterclass
Registration form

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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 see page 13 for registration inclusions.

Face-to-face full registration – 10 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 12 September 2025	☐ $845	☐ $1,240	☐ $1,145
Standard registration Register after Friday, 12 September 2025	☐ $1,045	☐ $1,440	☐ $1,345

Online full registration – 10 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 12 September 2025	☐ $845	☐ $1,240	☐ $1,145
Standard registration Register after Friday, 12 September	☐ $1,045	☐ $1,440	☐ $1,345

☐ I understand that the registration fees do not include printed materials. Access to materials will be electronic.

Networking function

The Networking function is INCLUDED in the registration fee for delegates attending the full intensive.

Thursday, 9 October 2025 at Mineral Springs Hotel

☐ Yes, I WILL be attending the Networking function OR

☐ No, I WILL NOT be attending the Networking function

☐ Yes, I require additional tickets for the Networking function at $80 per person

No. ______ x tickets at $80 each: $ ______

Dietary requirements:

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

JOIN TODAY

***Become a member and save!**

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and:

- save over $230 on Affiliate membership on 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

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

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3 Payment summary

Registration fees	$
Additional guest tickets – Networking function ($80 each)	$
Total payable	$

Please note: The Tax Institute cannot accept responsibility for delegates' late flight arrivals. Transfer costs are non-refundable and non-transferable.

4 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.

For event enquiries, please contact the National Events Team on **1300 829 338** or nationalevents@taxinstitute.com.au

For registration enquiries, please contact customeradmin@taxinstitute.com.au

Collection notice: The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTIs Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

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

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Join the conversation

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