

SHAPE THE MOMENT

3–5 September 2025

MCEC Melbourne

20 CPD hours

PROGRAM AT A GLANCE

Proudly supported by

BMT Tax Depreciation
QUANTITY SURVEYORS



Curtin University

Frontline
ACCOUNTING

the
PROPERTY
Accountant

Welcome Reception Sponsor



Join us and be part of the excitement! We have multiple sponsorship opportunities available.

Become a Tax Summit partner

Contact Paul Camus, National Sales and Services Manager at paulcamus@taxinstitute.com.au
or call direct on +61 2 8223 0003

SHAPE THE MOMENT at The Tax Summit



From powering small businesses, to supporting growing families, from innovative Australian industry to cross-border collaboration, tax shapes our world.

But *you* shape tax.

You build your skills and expertise. You uphold integrity and ask the tough questions with insight and respect. You choose to approach every challenge as an opportunity. You can't always predict or control the future, but the current moment belongs to you.

Join thought leaders, industry experts, and fellow practitioners at The Tax Summit in 2025 to explore the tools, knowledge and connections you need to thrive as a tax professional in today's changing landscape.

Tax shapes the world,
how will you shape the moment?

Full program coming soon!

[Register now ►](#)

Highlights

70⁺

speakers

40⁺

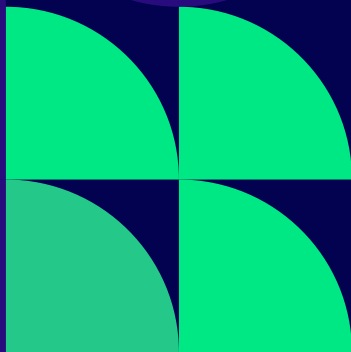
sessions

20

CPD hours

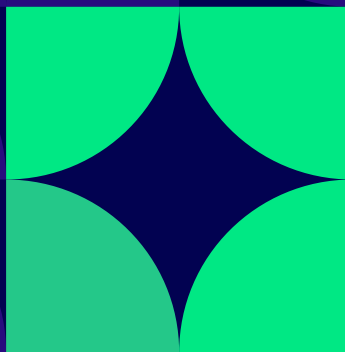
3

days



Learn

Hear from the latest tax thought leaders



Shape








Contribute to the direction of tax in Australia



Connect

Network with peers

The Tax Summit • Streams

SME	Corporate	Tax Disputes	Indirect Tax	Next Generation	Ethics	Hot Topics
 <p>Join leading tax experts for in-depth sessions on trusts, estate planning, Division 7A, superannuation and more – tailored for SME advisers, sole practitioners, mid-tier partners, lawyers, barristers, academics, government professionals.</p>	 <p>A cutting-edge tax technical stream delivered by Big 4 firms, legal experts, and regulators – diving into key issues like M&A, residency, and demergers. Perfect for Big-4, ATO leaders, top-tier lawyers, barristers, and heads of tax from ASX 200 companies.</p>	 <p>Navigate the sharp end of tax – featuring expert insights on managing disputes, litigation strategies, and practical tips and traps when conflicts arise. Aimed at sole and SME practitioners, tax controversy specialists, lawyers, barristers, and in-house tax teams facing ATO scrutiny.</p>	 <p>Stay ahead of the curve with the Indirect Tax stream – tackling contemporary issues in stamp duty, the rough edges of GST, and payroll tax in the gig economy. Essential for advisers, in-house teams, and legal professionals navigating this fast-evolving space.</p>	 <p>Designed for tomorrow's top tax professionals, this stream delivers practical insights and aspirational guidance to help new entrants build strong foundations for a successful tax career. Perfect for those in need of a refresher or accounting and legal firm staff up to manager level, as well as early-career industry representatives.</p>	 <p>A stream dedicated to tackling real-world dilemmas facing today's tax professionals – offering practical guidance on navigating family breakdowns, as well as exploring the ethical challenges of AI, data, and digital responsibility. A must for advisers committed to integrity in a rapidly changing landscape.</p>	 <p>A dynamic tax technical stream for all Summit attendees – exploring emerging issues and challenges shaping the profession. Hear about the latest case update, with sessions on ATO debt, anti-money laundering and LPP, tariffs and Trump.</p>

The Tax Summit • 3–5 September 2025

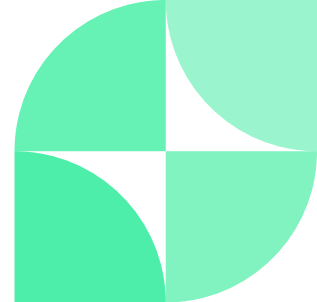
Pre-event

Session 1: Pre-recorded content coming soon...

Day 1 • Wednesday 3 September

From 9:00am	Registration			
10:00–10:30am	Session 2: Official welcome and President's address – Tim Sandow, CTA, President, The Tax Institute			
10:30–11:30am	Session 3: Justice Hill Memorial Lecture – Peter Walmsley, Deputy Chief Tax Counsel, Australian Taxation Office			
11:30–12:00pm	Morning tea			
	SME		Corporate	
12:00–1:00pm	Session 4.1: Intergenerational change – Trusts		Session 4.4: Pillar 2 in a shifting global landscape	
1:00–2:00pm	Lunch			
	SME	Tax Disputes	Next Generation	Corporate
2:00–3:00pm	Session 5.1: Australian beneficiaries of foreign trusts	Session 5.2: Tips and traps when a dispute emerges	Session 5.3: Revenue v Capital	Session 5.4: Diverted profits tax in practice – Insights from <i>PepsiCo</i>
3:00–3:30pm	Afternoon tea			
3:30–4:30pm	Session 6.1: Part IVA – PSI	Session 6.2: Key considerations in deciding whether to litigate a tax dispute	Session 6.3 Reading and interpreting legislation	Session 6.4: Intangibles in transition
	SME		Corporate	
4:30–5:30pm	Session 7.1: What's on the radar for SMEs		Session 7.4: What's on the ATO radar for Corporates?	
5:30–7:30pm	Welcome Reception, Aerial, South Wharf			

The Tax Summit • 3–5 September 2025



Day 2 • Thursday 4 September

8:30–9:15am	Session 8: Recent and emerging developments shaping our tax system			
9:15–10:00am	Session 9: Commissioner’s address – Rob Heferen, Commissioner of Taxation, Australian Taxation Office			
10:00–10:30am	Morning tea			
	SME	Indirect Taxes	Hot Topics	Corporate
10:30–11:30am	Session 10.1: Dealing with loans and UPEs in estate planning	Session 10.2: Contemporary issues with stamp duty	Session 10.3: Managing taxpayer debt – An ATO perspective	Session 10.4: Thin capitalisation – From legislation to application
11:30am–12:30pm	Session 11.1: Managing client debt with the ATO	Session 11.2: GST – The rough edges	Session 11.3: The evolving role of Tax Practitioners – Code, breaches and compliance	Session 11.4: Impacts and general issues arising from debt deduction rules
12:30–2:00pm	Lunch and Session 12: Technical session – Lunch (session commencing at 1:00pm)			
2:00–3:00pm	Session 13.1: Losses – General session	Session 13.2: State taxes in the gig economy	Session 13.3: Case update	Session 13.4: Shaping the future of global tax – Head of tax insights
3:00–3:30pm	Afternoon tea			
	SME		Corporate	
3:30–4:30pm	Session 14.1: Deep dive on ATO application of 109T		Session 14.4: Hybrids	
4:30–5:30pm	Session 15.1: How big-end rules are reshaping SME compliance		Session 15.4: Future proofing your TP	
5:30pm	Delegate free time			
7:00pm	Tax Summit Gala Dinner			

The Tax Summit • 3–5 September 2025

Day 3 • Friday 5 September 2025

8:30–9:30am	Session 16: VIP presentation			
	SME	Ethics	Hot Topics	Corporate
9:30–10:30am	Session 17.1: Critical knowledge for advisers	Session 17.2: Tax, ethics, and family breakdowns – Practical guidance for advisers	Session 17.3: Legal Professional Privilege – What is it and how is it used	Session 17.4: Economic outlook in a shifting global landscape
10:30–11:00am	Morning tea			
11:00am–12:00pm	Session 18.1: Areas of wide-spread misunderstanding	Session 18.2: Navigating ethics in the digital age – AI, data, and professional responsibility	Session 18.3: Taxes, tariffs and Trump	Session 18.4: Mutual Agreement Procedures
	SME		Corporate	
12:00–1:00pm	Session 19.1: Shaping SMSF strategies – Big changes advisers need to know		Session 19.4: M&A tax update	
1:00–2:30pm	Session 20: Closing keynote – Seated lunch			

See you in Melbourne

Melbourne continues to thrive as Australia's cultural capital – where iconic laneways, award-winning dining, and a vibrant arts scene collide.

The city is alive with energy and innovation around every corner. At the heart of it all is the Melbourne Convention and Exhibition Centre (MCEC) – Melbourne's home of bold and world-class events.

As the venue for this year's biggest tax event, MCEC offers a first-class experience in a prime riverside location. With Melbourne's buzzing restaurants, galleries, and nightlife just steps away, your summit experience can seamlessly extend into the city itself.

Contact us

1300 829 338
nationalevents@taxinstitute.com.au

Accommodation

Favourable room rates have been negotiated and secured at various accommodation options around Melbourne. You can view accommodation options and book below:

[Book your accommodation ►](#)

We can't wait to see you there.

[Register now ►](#)





Thank you

The Tax Institute gratefully acknowledges the generous assistance of members of The Tax Summit Organising Committee and The Tax Summit Program Committee.

The Tax Summit Organising Committee:

Tim Sandow, CTA, President, The Tax Institute, Organising Committee, Chair

Paul Banister, CTA, Grant Thornton

Leanne Connor, CTA, WGC Business Advisors

Sandra Farhat, CTA, EY

Marg Marshall, CTA, WLF Accounting Advisory

Rae Ni Corraidh, CTA, Knowledge Shop

Dioni Perera, FTI, EY

Jerome Tse, CTA, King Wood Mallesons

Todd Want, CTA, William Buck

The Tax Summit Program Committee:

Sandra Farhat, FTI, EY, Co-Chair

Daniel Smedley, CTA, Sladen Legal, Co-Chair

Paul Banister, CTA, Grant Thornton, Special Topics Stream Chair

Leo Efthivoulou, CTA, ENA Law, Hot Topics Stream Chair

Loreena Gillon, CTA, Arithmos Chartered Accountants, SME Stream Chair

Annemarie Wilmore, Johnson Winter Slattery, Corporate Stream Chair

Catherine Dean, CTA, BDO

Jeremy Geale, CTA, MinterEllison

Luke Imbriano, FTI, Corrs Chambers Westgarth

John Ioannou, CTA, Macpherson Kelley

Victoria Lanyon, King & Wood Mallesons

Kaitilin Lowdon, ATI, Sladen Legal

Scott McGill, CTA, Pitcher Partners

Matthew McKee, CTA, Brown Wright Stein

Chris Peadon, FTI, New Chambers

Modiesha Stephens, CTA, MS Legal

Amelia Teng, Deloitte

Simon Tucker, CTA, S W Accountants and Advisors

Adrian Zuccarini, FTI, Australian Taxation Office

taxinstitute.com.au/tax-summit