

Women in Tax

30 October 2025

The Duxton Hotel, Perth

1 CPD hour



Supporting Vulnerable Clients - Strategies for Financial Stability

Join us for a dynamic and insightful panel discussion featuring the Tax Ombudsman and representatives from the tax profession. Together, we will explore how the profession can play a more active role in helping clients at risk to achieve long-term financial security.

Our expert panellists will examine the impacts of financial abuse, the challenges faced by those without access to professional support, and the critical role the ATO and financial professionals can play in providing meaningful, effective assistance.

Key topics covered:

- Identifying the various forms of financial abuse and recognising early warning signs.
- Practical strategies for supporting vulnerable individuals and connecting them with available resources.
- Approaches to assisting clients with limited financial means to engage professional help.
- Communication techniques to help prevent financial exploitation and build client trust.

This session will deliver practical, actionable strategies to strengthen your capacity to assist clients in distress, advocate for their financial well-being, and apply best practices that make a lasting impact.

Panel: Tracy Dunn, EY, Annette Morgan, Curtin University, Ruth Owen CBE GAICD, Tax Ombudsman



Event Details

30 October 2025

The Duxton Hotel, 1 St Georges Tce

1:00PM – 3:00PM



We welcome all supporters of diversity
and empowering women in the workplace
no matter what your gender

Register now

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your tickets!



Speakers

Ruth Owen was appointed to the role of Tax Ombudsman for a term of 5 years commencing on 15 July 2024. Ruth brings a wealth of experience in tax, public administration, complaints management and dispute resolution, having spent more than 30 years in various senior leadership positions across the public sector in Australia and the United Kingdom (UK). Ruth was previously a Director General and Tax Commissioner of His Majesty's Revenue and Customs in the UK, Head of Profession for operational delivery in the UK Civil Service and Deputy CEO of Jobcentre Plus, the UK employment service and welfare service delivery agency. Most recently, Ruth spent over three years in NSW Government, as a Deputy Secretary at Education and then leading the delivery of public sector reform in the NSW Premier's Department. Ruth was awarded the CBE in the UK for her public service in reducing unemployment during the GFC.



Tracey Dunn is a Director with EY, Private – Tax in Perth. Tracey has a Bachelor of Business (Accounting), a Graduate Certificate in Commercial Law, a Bachelor of Laws and a Graduate Diploma in Legal Practice. Tracey was admitted as a lawyer in the Supreme Court of Western Australia in May 2022. Tracey has worked in public practice for over 20 years. Prior to commencing a career in public practice, Tracey worked in commerce in various roles. Tracey's expertise lies in providing both simple and complex tax advice to high wealth high net worth individuals, private groups, small and medium-sized businesses, and corporate entities. She has significant experience in advising on the application of FBT, Div 7A and trusts and regularly presents on taxation topics.



Annette Morgan is an accomplished academic and professional tax practitioner with over 30 years of experience in taxation. She is the Discipline Lead of Taxation and the Director of the Industry and Community Engagement Hub at Curtin University, where she also founded the nationally recognised Curtin Tax Clinic. Annette is a member of the Australian Taxation Office Tax Practitioners Stewardship Group and serves on several committees within the Tax Institute, contributing to national discussions on tax policy, education, and professional standards. She is also a government appointed member of the WA Legal Cost Committee. Her work spans clinical education, financial literacy, and innovative teaching, and she has received multiple awards for her contributions to the profession and the community.



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1 Registration

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