The Tax Institute

Local Tax Club Geelong

20 February – 27 November 2026

Crowne Plaza, Geelong

1.5 CPD hour per session

Join your Local Tax Club today!

The latest hot topics in tax and local connections

Looking to stay on top of the latest in tax while connecting with like-minded professionals in your area? Your Local Tax Club is the perfect way to keep your knowledge fresh, expand your network, and stay informed about the key tax topics that matter to you and your clients.

Each local tax club features 10 monthly sessions, running from February to November covering a specialist tax topic presented by a subject matter expert. Included also is a comprehensive monthly tax update to keep you informed about Australia's constantly evolving tax landscape.

Our flexible registration options mean you can register for the full series or just select the sessions you wish to attend. You can also get your team Involved with a company subscription and send a different team member to each session, which is a great way for them to enhance their knowledge and establish their networks within the profession.

Join your Local Tax Club today and gain access to valuable resources, deeper professional connections, and up-to-the-minute tax knowledge to keep you ahead of the curve.

Who should attend?

This series will provide you with quintessential updates and topical tax content tailored for you and your local tax community.

Schedule

20 February – 27 November 2026

1.5 CPD hours per session

Crowne Plaza, Geelong

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.

5 session subscription

5 session credits to use throughout the year at the discounted price allowing you to choose which months you would like to attend.

Individual sessions

Tailor your attendance by simply indicating your preferred session/s on the registration form.

Technical Program

Date/Time	Session	Presenter
Friday 20 February 7.30-9:00am AEDT Crowne Plaza 33 Smythe St Geelong	**Part 1: Outlook for 2026** This session will explore the anticipated tax landscape for 2026, highlighting legislative developments and emerging ATO priorities.	**Special topic presenter:** Karen Goodfellow, CTA, Goodfellow Tax Advisory **Tax update presenter:** Neil Brydges, CTA, Sladen Legal
Friday 27 March 7.30-9:00am AEDT Crowne Plaza 33 Smythe St Geelong	**Part 2: Family trust elections – Looking at some regularly overlooked issues** This session provides an in-depth discussion on Family Trust Elections, including their purpose, the requirements for making a valid election, and the practical impacts which may result from having made one. We will also explain when these elections are advantageous and the consequences of incorrect or missing elections.	**Special topic presenter:** Micaela Bernfield, ATI, Arnold Bloch Leibler **Tax update presenter:** Kaitilin Lowdon, ATI, Sladen Legal
Friday 24 April 7.30-9:00am AEST Crowne Plaza 33 Smythe St Geelong	**Part 3: Navigating trust loss provisions - Practical strategies for complex structures** Building on the FTE/IEE session, this session explores the trust loss provisions and how the various tests apply in practice. We will examine the interaction between loss rules and family trust elections, and discuss strategies to preserve and utilise losses within family groups and complex structures. This session will cover: • Practical application of trust loss rules and tests; • Interaction between loss rules and fixed trust elections; and • Strategies for preserving and using losses in complex structures.	**Special topic presenter:** Neil Brydges, CTA, Sladen Legal **Tax update presenter:** Kaitilin Lowdon, ATI, Sladen Legal

Friday 29 May 7.30-9:00am AEST Crowne Plaza 33 Smythe St Geelong	**Part 4: Navigating 296 – End of financial year** This session will unpack the purpose and operation of the revised Div 296 and how it could influence end-of-year tax processes. We will walk through calculations and projections, alongside important considerations for affected superannuation members.	**Special topic presenter:** Daniel Arnephy, CTA, Accru Melbourne **Tax update presenter:** Neil Brydges, CTA, Sladen Legal
Friday 26 June 7.30-9:00am AEST Crowne Plaza 33 Smythe St Geelong	**Part 5: Tips and traps - Navigating with changing structures and back-to-back rollovers** As business structures evolve, tax rollover relief becomes increasingly important—yet also more complex. This session highlights the key rollover provisions commonly relied upon during restructures, the reasons they are commonly used and key issues to consider. Further the reasons for the use of back-to-back rollovers and the risks arising when multiple rollovers are used sequentially. The ATO forthcoming practical guideline post the Aus Net decision will be discussed if issued.	**Special topic presenter:** Tony Pointon, CTA, Pointon Partners **Tax update presenter:** Kaitilin Lowdon, ATI, Sladen Legal
Friday 31 July 7.30-9:00am AEST Crowne Plaza 33 Smythe St Geelong	**Part 6: Tax agents duties** This session takes a practical look at the responsibilities and expectations placed on tax agents, particularly in an environment of heightened scrutiny. It reinforces the behaviours, practices and professional standards that help safeguard both clients and advisers.	**Special topic presenter:** Christian Febbraro, FTI, Piper Alderman **Tax update presenter:** Neil Brydges, CTA, Sladen Legal

Friday 21 August
7.30-9:00am AEST
Crowne Plaza
33 Smythe St
Geelong
	Part 7: Revenue and capital
	The distinction between capital and revenue is a foundational concept in tax law, yet it remains a highly litigated and evolving area. This session revisits the core principles underpinning the capital/revenue divide, explores why the issue continues to resurface, and examines how recent developments - including the Morton case - are reshaping the legal principle. This session will cover:
	• The enduring relevance of the capital/revenue distinction - Why this “old chestnut” still matters for practitioners and clients alike.
	• Frameworks and guiding principles - Revisiting the key judicial tests and statutory considerations:
	    ○ Recent developments and case law - A dive into Morton v FCT and capital / revenue in the property law cases as well as recent GST cases such as VZFS and Commissioner of Taxation (Taxation) [2025] ARTA 2013, and their implications.
	    ○ Emerging issue - Exploring the “reverse Whitfords Beach” scenario and recent case law where
		Special topic presenter:
		Adam Dimac, Hall & Wilcox Lawyers
		Tax update presenter:
		Kaitilin Lowdon, ATI, Sladen Legal

	taxpayers abandon a scheme before completion; and ○ Strategic considerations for advisors- How to approach uncertain classifications, manage risk, and support clients with defensible positions.	
Friday 18 September 7.30-9:00am AEST Crowne Plaza 33 Smythe St Geelong	**Part 8: Succession planning** This session covers the tax considerations involved in passing control or ownership of a business or investment structure to the next generation. We will explore CGT implications, restructuring opportunities, and strategies for preserving small business concessions. Beyond tax, the session will address governance, family expectations, and the practical steps required to implement a smooth and commercially sound succession plan.	**Special topic presenter:** Jenni Nash, EY **Tax update presenter:** Neil Brydges, CTA, Sladen Legal
Friday 30 October 7.30-9:00am AEDT Crowne Plaza 33 Smythe St Geelong	**Part 9: Victorian landholder duty and case studies** This session provides an overview of the Victorian landholder duty regime, explaining when landholder duty applies to changes in ownership of companies and trust holding land. We will break down the acquisition thresholds, tracing rules, and aggregation provisions that can unexpectedly trigger duty.	**Special topic presenter:** Rachel O'Donnell, CTA, O'Donnell Tax Law **Tax update presenter:** Kaitilin Lowdon, ATI, Sladen Legal
Friday 27 November 7.30-9:00am AEDT Crowne Plaza 33 Smythe St Geelong	**Part 10: Bendel and UPE's** This session outlines the implications of the Bendel decision for unpaid present entitlements and their treatment within trust–company arrangements. It offers clarity on how UPEs are now viewed and what this means for ongoing trust administration and planning.	**Special topic presenter:** Prudence Barker, VIC Bar **Tax update presenter:** Neil Brydges, CTA, Sladen Legal

Presenters

Daniel Arnephy, CTA, is a Director of Accru Melbourne, registered Tax Agent, Chartered Tax Advisor and member of Chartered Accountants Australia and New Zealand. Daniel primarily works in tax advisory for a range of clients and alongside regular ongoing compliance also regularly looks at transactional and succession issues for SME family businesses, private corporate clients, self-funded retirees and SMSF trustees and high net worth individuals.

Prudence Barker is a Barrister specialising in taxation and commercial law. Her practice encompasses state and federal revenue, regulatory and commercial matters. She brings a wealth of experience to the Bar from her previous roles in tax at the Australian Taxation Office and EY, as well as commercial experience as CEO of a medium-sized agri-business.

Micaela Bernfield, ATI, is a Senior Associate in Arnold Bloch Leibler's Sydney taxation group. Micaela advises across a wide range of Federal and State tax matters with a particular focus on tax residency, corporate and international tax, taxation of trusts, family trust elections, GST and tax controversy matters. Micaela has managed all stages of the ATO tax dispute lifecycle, from audits and reviews to objections and appeals. Micaela has also been recognised in the Legal 500 Asia Pacific in the area of taxation.

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.

Adam Dimac is an experienced tax lawyer and advises clients on a range of matters including tax planning and structuring, Division 7A, the small business CGT concessions, corporate restructuring, professional firm structures, trust taxation and cryptocurrency taxation. Adam regularly acts for taxpayers in dispute and controversy matters and provides assistance with ATO reviews and audits.

Christian Febbraro, FTI, is a Senior Associate at Piper Alderman specialising in tax disputes. Christian was previously employed at the Australian Taxation Office, Tax Practitioners Board and Deloitte. During his time at the regulators, Christian often appeared on their behalf in the Courts and Tribunals. Christian brings that knowledge in the advice and assistance he provides his clients, which are mostly in the SME space. Christian is an admitted lawyer in both the Supreme Court of Victoria and the High Court of Australia. In addition, Christian is a Chartered Accountant, a Fellow with the Tax Institute and has recently completed a Master of Laws at the University of Melbourne specialising in taxation. Christian is part of the Tax Institute's Next Generation committee.

"Breakfast Club is a great way to stay up to date in the ever-changing tax landscape, across both federal and state jurisdictions. The monthly update and special topics are informative, with thorough notes to support the content discussed"

Liam Money, ATI, Paul Money Partners

For event queries please contact the National Events team

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+1300 829 338

Karen Goodfellow, CTA, is the owner and principal of Goodfellow Tax Advisory Pty Ltd, providing specialist tax consulting services and training to accountants, lawyers and other advisors to SMEs and family groups. She is an experienced tax professional with extensive experience in the tax advising and education (CPD/CPE) space. As the founder and operator of two successful tax training businesses Karen has detailed knowledge of Australia's federal tax system. Karen's extensive experience providing tax advice and training gives her an excellent understanding of the most pressing issues facing tax practitioners such as CGT roll-overs, the Small business CGT concessions, the CGT main residence exemption, taxation of trusts and taxation of companies.

Kaitilin Lowdon, ATI, is a Principal Lawyer in Sladen Legal. She acts for a diverse range of clients, including (ultra) high net wealth individuals, family offices and business enterprises. Her expertise includes advising clients on high-profile and complex tax matters, including reviews, audits and litigation, and transactions, across a wide range of taxation matters. wealth individuals, family offices and business enterprises. Her expertise includes advising clients on high-profile and complex tax matters, including reviews, audits and litigation, and transactions, across a wide range of taxation matters.

Jenni Nash brings over 25 years of experience working closely with family groups, family office, individuals and small business advising on structuring, cross-border, personal and corporate tax advisory and compliance matters. Her engagements have included international structuring and tax advice for fast-growth or early-stage businesses looking to expand globally, tax planning for family office to ensure seamless transition between generations, and tax advice and structuring for a number of high profile or high net-wealth clients looking to relocate into or out of Australia. Jenni has assisted clients working through major life events to manage and mitigate tax outcomes in the most appropriate and advantageous way. Jenni actively looks after all facets of the private client relationship and works together with a suite of advisors to deliver assistance that is targeted, appropriate and efficient.

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, 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.

Tony Pointon, CTA, is a highly regarded commercial law practitioner who offers pragmatic and intelligent advice to a wide range of business clients. These clients are generally businesses that can be classified as small to medium sized (listed and unlisted on the Australian Stock Exchange), public companies, associations, institutes and universities. Tony is a respected and sought after commentator on Australian taxation matters and advises to Chartered Accountants and Certified Practising Accountants on complex taxation matters.

The Tax Institute

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
Single Session	☐ $150	☐ $545	☐ $200
5 Pack	☐ $600	☐ $995	☐ $750
Full Series 10 Pack	☐ $1200	☐ $1595	☐ $1500
Company Subscription	☐ $1350	N/A	☐ $1350

☐ Fri, 20 Feb 44911	☐ Fri, 27 Mar 44912	☐ Fri, 24 Apr 44913	☐ Fri, 26 Jun 44915
☐ Fri, 31 Jul 44916	☐ Fri, 21 Aug 44917	☐ Fri, 18 Sept 44918	☐ Fri, 27 Nov 44920

Dietary requirements:

Promotional code:

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- access member-only prices to this and future events
- access all member-only technical resources.

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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

JOIN TODAY

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

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)

☐ **Credit card** Card type: ☐ AMEX ☐ Visa ☐ MasterCard

Name on card:

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Cardholder's signature:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

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

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Alexander Knight, FTI, WGC Business Advisors

Monique Monahan, Harwood Andrews

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Tony Pointon, CTA, Pointon Partners