The Tax Institute

Local Tax Club Melbourne

19 February – 26 November 2026

Leonda by the Yarra, Hawthorn

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

19 February – 26 November 2026

1.5 CPD hours per session

Leonda by the Yarra, Hawthorn

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
Thursday 19 February 7:30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**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:** Bradley White, Hall & Wilcox
Thursday 26 March 7:30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**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:** Bradley White, Hall & Wilcox
Thursday 23 April 7:30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**Part 3: Navigating trust loss provisions - Practical strategies for complex structures** Building on the FTE and 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:** Bradley White, Hall & Wilcox

Thursday 28 May 7:30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**Part 4: Navigating 296 for SMSFs - End of financial year and beyond** 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:** Frank Hinoporos, CTA, Hall & Wilcox
Thursday 25 June 7:30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**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:** Frank Hinoporos, CTA, Hall & Wilcox
Thursday 30 July 7:30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**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:** Arthur Athanasiou, CTA-Life, AGA Legal **Tax update presenter:** Adam DImac, Hall & Wilcox
Thursday 20 August 7:30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**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 **Tax update presenter:** Bradley White, Hall & Wilcox

	taxpayers abandon a scheme before completion. ○ Strategic considerations for advisors- How to approach uncertain classifications, manage risk, and support clients with defensible positions.	
Thursday 17 September 7.30-9:00am AEST Leonda by the Yarra 2 Wallen Rd Hawthorn	**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:** Bradley White, Hall & Wilcox
Thursday 29 October 7.30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**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:** Adam Dimac, Hall & Wilcox
Thursday 26 November 7.30-9:00am AEDT Leonda by the Yarra 2 Wallen Rd Hawthorn	**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:** Adam Dimac, Hall & Wilcox

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.

Arthur Athanasiou, CTA (Life), is an Accredited Tax Law Specialist and Principal of AGA Legal Pty Ltd. He is a highly competent and well-respected tax lawyer with 30 years' experience. While he provides clients with tax and structuring advice, his main area of focus is in resolving tax disputes with the ATO and SRO and settling tax audits. Arthur also practises in matters involving tax agents and inquiries by the Tax Practitioners Board including appealing adverse TPB decisions. His practice also extends to white-collar crime, and other taxation offences. He also has a Deceased Estates practice. Arthur has qualified as a Chartered Accountant and is a former President of The Tax Institute. He has been appointed as an Adjunct Professor at La Trobe University Law School and chaired the Law Institute's Tax Law Advisory Committee for a decade.

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.

"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.

Frank Hinoporos, CTA, is a Partner in the Tax group at Hall & Wilcox. Frank has a particular focus on domestic and international tax for individuals and private groups, including the complex issues tax issues arising from international succession planning. His clients include SMEs, high net worth individuals and families and not-for-profit entities. Frank is a member of the Law Institute of Victoria, a Chartered Tax Adviser with The Tax Institute, a Fellow of the Governance Institute of Australia and a member of the Society of Trust and Estate Practitioners (STEP).

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.

Bradley White is a senior associate in Hall & Wilcox's Tax team, with a specialisation in state tax based matters, advising clients nation-wide. Bradley assists clients with their tax structuring, tax controversy, and tax planning needs, and has both federal and state tax expertise. Bradley has particular experience engaging with different state and territory revenue authorities on behalf of clients and objecting to, or applying for, exemptions with respect to land tax, duty and payroll tax issues. Bradley's clients are predominantly small-to-medium businesses and high net-worth family groups, with a focus on the property development, agriculture, not-for-profit and health sectors.

The Tax Institute

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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 select your registration type:

	Member	New member*	Non-member
Single Session	☐ $200	☐ $620	☐ $250
5 Pack	☐ $850	☐ $1270	☐ $1000
Full Series 10 Pack	☐ $1700	☐ $2120	☐ $2000
Company Subscription	☐ $1850	N/A	☐ $1850

Please select your session/s:

☐ Thu 19 Feb 44895	☐ Thu 26 Mar 44896	☐ Thu 23 Apr 44897	☐ Thu 28 May 44898	☐ Thu 25 Jun 44899
☐ Thu 30 Jul 44900	☐ Thu 20 Aug 44901	☐ Thu 17 Sept 44902	☐ Thu 29 Oct 44903	☐ Thu 26 Nov 44904

Dietary requirements:

Promotional code:

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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

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:

Card no.: Expiry date: MM/YY

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

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

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

Megan Bishop, Piper Alderman, Co-Chair, Local Tax Club Organising Committee

Laura Hussey, ATI, KHQ Lawyers, Co-Chair, Local Tax Club Organising Committee

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Alexander Knight, FTI, WGC Business Advisors

Monique Monahan, Harwood Andrews

Dominic Morello, CTA

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