The Tax Institute

Local Tax Club Perth

February – November 2026

HHG Legal Group, Perth CBD

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

25 February – 25 November 2026

1.5 CPD hour per session

HHG Legal Group, Perth CBD

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 whichmonths 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
Wednesday 25 February 7:30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 1: AI, Law & Business** This session will cover the practical realities of AI, law and business risk. The session cuts through hype and focuses on what organisations are facing right now - real incidents, emerging legal duties, and the shifting insurance environment that's catching many off guard. Topics covered include: • Real world AI incidents and what they teach us (with key takeaways for business); • Privacy rights in the digital age - practical privacy protection in the AI age; • Managing risk and Liability; • Insurance considerations for AI adoption; and • Practical steps to protect your business.	**Special topic presenter:** Murray Thornhill, HHG Legal Group **Tax update presenter:** Tracey Dunn, EY
Wednesday 25 March 7:30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 2: Employer tax obligations** Hiring of staff comes with an array of complex legal and tax issues. Employers must navigate these obligations carefully, as any misstep can be costly, not just in terms of dollars but also in terms of business reputation. This this session will cover: • FBT – key issues to consider and recent updates; • Payroll tax – grouping and recent updates; and • Payday super - all you need to know.	**Special topic presenter:** Niamh Oakley, RSM Australia **Tax update presenter:** Tracey Dunn, EY
Wednesday 29 April 7:30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 3: Super – SMSF update** This session will explore a range of recent and emerging SMSF compliance issues, with a focus on key risk areas and practical implications for trustees and advisers. With a focus on: • NALE/NALI – recent developments and key compliance considerations; • In-house assets – issues, risks and management options; and • Division 296 – overview and potential impact (if the measure is re-introduced into Parliament).	**Special topic presenter:** Christie Butler, Cooper Partners **Tax update presenter:** Tracey Dunn, EY

Wednesday 27 May

7:30-9:00am AWST
HHG Legal
Cloisters Building
Level 8/863 Hay Street
Perth

Part 4: GST and Property development

Property issues continue to be the biggest source of legal disputes regarding the GST. The reasons for this are many including:

- The differences in the GST treatment of the various forms of real property;
- The misinformation surrounding the application of the margin scheme;
- “Expert” opinions on GST matters by real estate agents and developers
- The important distinction between a partnership and a joint venture
- A lack of understanding of GST by both (or either) parties to the transaction; and
- The complexity of certain land transactions provisions.

This session will identify issues that you should be aware of when considering the GST implications of property transactions.

Special topic presenter:
Tony Ince, Moore Australia

Tax update presenter:
Tracey Dunn, EY

Wednesday 24 June

7:30-9:00am AWST
HHG Legal
Cloisters Building
Level 8/863 Hay Street
Perth

Part 5: Navigating issues for deceased estates

This session will explore the practical and risk-focused issues that arise when dealing with deceased estates, particularly where advisers, executors and family members may have overlapping interests or roles.

This session will cover:

- The executor’s perspective – key responsibilities, expectations and pressure points;
- Conflicted parties – managing family dynamics, related parties and perceived or actual conflicts;
- Non-tax issues to be aware of – recognising boundaries to avoid the accidental practice of law; and
- When the accountant is also the executor – managing private group structures and connections where the executor has multiple roles.

Special topic presenter:
Kimi Shah, HHG Legal Group

Tax update presenter:
Tracey Dunn, EY

Wednesday 29 July

7:30-9:00am AWST
HHG Legal
Cloisters Building
Level 8/863 Hay Street
Perth

Part 6: Tax consolidation for SMEs

The tax consolidation regime allows corporate groups that have wholly owned subsidiaries to be taxed as a single entity. The regime can often result in lower compliance costs and even tax savings. However, it is still somewhat feared by the SME market for the complexities it can introduce and the difficulties of implementation.

This session is designed to provide a high-level overview of the key consolidation concepts for SME and some lookouts for those considering forming a tax consolidated group or acquiring companies that would become members of an existing group, it will cover:

- The core rules of tax consolidation;
- How to approach Allocable Cost Amount calculations and tax cost setting process;
- Available Fraction calculations and modifications; and
- Exit issues and the importance of a Tax Sharing and Tax Funding Agreement.

Special topic presenter:
Ben Macpherson, CTA, Pitcher Partners

Tax update presenter:
Tracey Dunn, EY

Wednesday 26 August 7:30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 7: Transfer duty concessions and exemptions** An overview of key Western Australian transfer duty considerations, with a focus on practical applications and common scenarios involving SMSFs. • Explore transfer duty exemptions and concessions available in Western Australia; • Understand the rules and requirements around vesting from SMSFs and the duty implications; and • Identify common pitfalls and strategies to ensure compliance when transferring or restructuring assets.	**Special topic presenter:** Yikai Hoe, CTA, Provident Lawyers **Tax update presenter:** Tracey Dunn, EY
Wednesday 23 September 7:30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 8: R&D - Getting it right** Navigating the R&D Tax Incentive can be a powerful way for SMEs to unlock innovation funding but getting it wrong can be costly. This session will explore the common pitfalls SME practitioners face when preparing and lodging R&D claims and provide practical guidance on how to avoid them. This session will cover: • What qualifies as R&D under the legislation (and what doesn't); • Documentation and record-keeping essentials to support claims; • Risk areas that attract scrutiny from regulators; • Lessons from real-world case studies where claims went wrong; and • Best practices for working with clients to ensure compliance and maximise benefits.	**Special topic presenter:** Tanya Brisbane, FTI, SEER Financial Group **Tax update presenter:** Tracey Dunn, EY
Wednesday 28 October 7:30-9:00am AWST HHG Legal Cloisters Building Level 8/863 Hay Street Perth	**Part 9: Small Business CGT Concessions - When is an asset really 'active'?** This session drills into the meaning of an "active asset" for small business CGT concession purposes and will discuss; • Landlord/licensor scenarios; • Land and buildings used in a business carried on by associated entities; and • Treatment of intangibles. This session will work through borderline fact patterns and ATO guidance to test where the line is drawn.	**Special topic presenter:** Gaurav Chitnis, CTA, HLB Mann Judd **Tax update presenter:** Tracey Dunn, EY

Wednesday 25 November

7:30-9:00am AWST
HHG Legal
Cloisters Building
Level 8/863 Hay Street
Perth

Part 10: Family trusts elections

It is no secret that the Australian Taxation Office (ATO) is actively scrutinising Family Trust Elections (FTE), Interposed Entity Elections (IEE), and the potential application of Family Trust Distribution Tax (FTDT), with 'succession planning' a targeted focus area of its private wealth program. Consistent with many other tax matters relating to trusts, relevant issues are both complex and esoteric. The consequences of FTDT are severe for any affected group, a fact compounded by the absence of any explicit discretion on the part of the Commissioner to disregard or show clemency in the event of breaches lacking advertency or wrongful purpose.

With the foregoing in mind, this session seeks to promote awareness and understanding of relevant issues by exploring:

- The relevant problem statement;
- The advantages and implications of FTEs;
- The advantages and implications of IEEs;
- The ATO's compliance approach and prevailing views; and
- Tricks and traps.

Special topic presenter:
Liam Telford, RSM Australia

Tax update presenter:
Tracey Dunn, EY

Presenters

Tanya Brisbane, FTI, has 25 years of experience in life sciences and advisory, Tanya is a multi-disciplinary professional with expertise in tax, accounting, and medical science. She specialises in providing R&D tax and government incentive services, helping companies secure non-dilutive funding. Tanya has delivered R&D tax services across various industries in Australia, including life sciences, resources, technology, and renewables. She has supported clients throughout their business lifecycle, from startups to multinationals. Starting her career as a medical scientist, Tanya transitioned into the advisory space, working with both Big 4 and global mid-tier firms. She brings technical expertise and practical commercial solutions to her clients. Tanya is passionate about STEM and innovation, and is dedicated to providing future-focused client service.

Christie Butler, CTA, is a senior manager with Cooper Partners Financial Services. Initially working in both tax and super, Christie has specialised in SMSFs over the last 20 years in both superannuation compliance and advice. She has a keen interest in assisting SMSF's with rectifying compliance issues, estate planning and divorce.

Gaurav Chitnis, CTA, is a Partner at HLB Mann Judd. He is a Chartered Accountant, CPA, Chartered Tax Advisor, and a lawyer admitted to the Supreme Court. Gaurav has over 18 years of experience as a tax advisor in the SME space and specialises in CGT, Division 7A, business restructures, taxation of trusts and tax residency. Gaurav's clients are predominantly other accountants who require specialist tax advice and assistance with rulings, objections and managing ATO audits for their clients. Gaurav is a regular presenter at various tax forums and is also a guest lecturer at Curtin University.

Tracey Dunn is as 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.

Yikai Hoe, CTA, is the director and founder of Provident Lawyers, a superannuation, taxation and commercial law firm in Western Australia. He is a SMSF Specialist Advisor, Chartered Tax Adviser and a Trusts and Estate Practitioner. Yikai works closely with clients and their advisors to provide legal support on a myriad of value-added solutions for all types of superannuation, tax and commercial matters. He enjoys working on complex transactions and compliance issues involving complicated structures, trusts, and SMSFs. Yikai is passionate about sharing his knowledge. He has presented on many superannuation, tax, trusts, estate and succession planning and commercial law topics.

" If you aspire to being a great Tax Professional, keeping up to date with tax technical knowledge is integral. There is no better way to do that than getting to the Local Tax Club for a nice coffee and continental breakfast each month and hearing the latest in tax being delivered by your tax peers in a friendly, professional manner."

Shane Wagner, CTA, Duncan McPhail & Co

For event queries please contact the National Events team

nationalevents@taxinstiute.com.au
1300 829 338

Tony Ince has more than 30 years' experience in indirect tax matters. He has been involved in the GST since its inception in Australia and was the spokesperson for CPA WA during implementation. Tony also practices in the area of Fuel Tax Credits and state taxes, such as payroll tax and land tax. In this capacity, he has presented on indirect tax topics at numerous state and national events, including CPA Congress and Taxation Institute State Taxes Conferences. Since 2003, he has lectured as a sessional lecturer in undergraduate and post-graduate tax at Curtin University and also instructs for the Tax Institute in their "Structured Education Program".

Ben Macpherson, CTA, is an Executive Director in Pitcher Partners tax consulting team and have been working in public practice for over ten years focusing on taxation issues affecting corporate and multinational clients with an emphasis on natural resources. Ben regularly deals with issues affecting large proprietary companies and small listed companies and has experience preparing deferred tax calculations and disclosures.

Kimi Shah is an experienced Wills & Estates lawyer with a deep focus on complex estate planning, administration and litigation. Her approach is highly personalised, ensuring each client receives advice aligned with their family dynamics, asset-protection goals and tax considerations.
With recognised expertise in trust law, Kimi conducts comprehensive trust reviews, variations and restructures, and acts in contested trust matters. She serves as a trusted advisor to trustees and beneficiaries alike, including trustees navigating the intersection between trust law and Family Law disputes.

Murray Thornhill is a leader in dispute resolution and litigation and has led the business and government division of HHG Legal Group since 2003. Murray is an experienced, skilled and efficient commercial dispute resolution lawyer. Focused on dispute resolution, construction, insolvency, employment, property and trusts and estate matters. He has represented clients in most Courts and tribunals in WA and the Federal and High Courts, and has also advised substantial charities, schools, board members and other non-profit bodies. He is also an experienced presenter & educator on a range of legal issues to industry and to professional and government bodies. Murray is a Notary Public with experience in all aspects of notary work.

Liam Telford is a Partner at RSM Australia and leads its tax technical and tax governance practices. Liam has 20 years of professional experience within and outside of Australia, including several years in Singapore. His experience encompasses roles with the Australian Taxation Office, industry (BHP, Standard Chartered Bank, and Transurban), as well as 'Big 4' firms Deloitte and KPMG.

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
10 session subscription	☐ $700	☐ $1,095	☐ $1,000
5 session subscription	☐ $350	☐ $745	☐ $500
Company subscription	☐ $850	☐ N/A	☐ $850
Individual session	☐ $100	☐ $495	☐ $150

Please select your session/s:

☐ Wed, 25 Feb 44935	☐ Wed, 25 Mar 44936	☐ Wed, 29 Apr 44937	☐ Wed, 27 May 44938	☐ Wed, 24 Jun 44939
☐ Wed, 29 Jul 44940	☐ Wed, 26 Aug 44941	☐ Wed, 23 Sep 44942	☐ Wed, 28 Oct 44943	☐ Wed, 25 Nov 44944

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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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

Cardholder's signature:

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/Perth

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

Gaurav Chitnis, CTA, HLB Mann Judd

Mike Cooper, Australian Tax Office

Yikai Hoe, CTA, Provident Lawyers

Annette Morgan, CTA, Curtin University

Joanne Wynne, CTA, RSM Australia

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