The Tax Institute

Next Gen Tax Discussion Group Melbourne

12 February – 3 December 2026

Multiple location – Melbourne CBD

1 CPD hour per session

6:00 - 7:30pm

Connect, discuss and collaborate at our Next Generation Tax Discussion Group

A space for emerging professionals to share ideas and build their network.

The Next Generation Tax Discussion Group meets bi-monthly from February to December and provides a dynamic forum for emerging and early-career practitioners to connect, collaborate, and deepen their technical expertise. Each session brings together a mix of structured technical updates, real-world insights, and interactive discussion,

The program is designed to support your ongoing professional development by covering a broad range of relevant and timely tax topics. Each session provides practical insights and encourages open discussion, helping participants deepen their understanding and stay informed throughout the year.

With flexible registration options, you can register for the full series to benefit from continuous learning, or choose individual sessions that align with your specific interests or development goals.

Be part of the Next Gen Tax series to stay ahead of emerging tax trends, strengthen your technical foundation, and build valuable relationships with peers and fellow professionals who share your commitment to growth and excellence.

Sessions

Part 1: Thursday 12 February 2026

Part 2: Thursday 30 April 2026

Part 3: Thursday 4 June 2026

Part 4: Thursday 6 August 2026

Part 5: Thursday 1 October 2026

Part 6: Thursday 3 December 2026

Who should attend?

This Next Gen Tax Discussion Group series is designed for tax professionals and is suitable for anyone with up to 8-years experience.

Full series

Register for the full series and receive an event reminder and materials ahead of each session.

Individual sessions

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

Technical Program

Date/Time	Session	Presenter
Thursday 12 February 6:00-7:30pm AEDT Piper Alderman Level 23/459 Collins St, Melbourne, VIC 3000	**Part 1: What is the tax dispute lifecycle and what is the Commissioner's stance on debts** This session's focus is to explain the general ATO dispute process and how a matter can progress through each stage from assessment to litigation. The session will share practical experiences and tips when dealing with the ATO in a dispute. The session will conclude with an update on the Commissioner's stance of debts, including debt recovery, director penalty notices and the imposition of GIC.	**Special topic presenter:** Megan Bishop, Piper Alderman
Thursday 30 April 6:00-7:30pm AEST Forvis Mazars Bourke Place Level 5/600 Bourke St, Melbourne, VIC 3000	**Part 2: Div 7A - Fundamentals and common pitfalls** Div 7A is almost unavoidable in the private wealth and SME space and continues to challenge taxpayers navigating its complex provisions. For Next Gen tax practitioners, a solid understanding of Div 7A fundamentals and awareness of common pitfalls is essential. This session will explore key concepts, highlight frequent mistakes and work through real-world scenarios. Attendees are encouraged to bring along practical problems to discuss with the group. By the end of the session, attendees will: • Gain a clear understanding of the purpose and scope of Div 7A and its key concepts; • Recognise common traps and compliance risks faced by tapxayers; and • Learn practical strategies to manage Division 7A issues effectively.	**Special topic presenter:** Amanda Guruge, CTA, Tax Controversy Partners
Thursday 4 June 6:00-7:30pm AEST Hall & Wilcox Queen & Collins Level 31, Tower 376/390 Collins St, Melbourne VIC 3000	**Part 3: State taxes** This session will explore the complexities of state taxes, focusing on how they impact businesses, individuals, and cross-border transactions. Participants will gain insights into current challenges, legislative updates, and practical approaches to navigating state tax obligations.	**Special topic presenter:** Bradley White, Hall & Wilcox

Thursday 6 August

6:00-7:30pm AEST
Venue:
HWLE Lawyers
Collins Arch
Level 8/447 Collins St,
Melbourne VIC 3000

Part 4: How to engage as a Next Gen tax professional - From ATO engagements to business development!

Special topic presenter:
Vincent Licciardi, HWLE Lawyers

For Next Gen tax professionals, two of the most confronting things that they will come across in their careers is:

- Their first ATO engagement (whether that is an ATO review, audit or objection); and
- Business development.

This special two-part session led by Vincent Licciardi will provide Next Gen tax professionals with best practice and insights on how to both "engage" with the ATO and your network.
This session will cover:

- The five golden rules for engaging with the ATO; and
- The five golden rules for engaging with prospective clients.

Thursday 1 October

6:00-7:30pm AEST
Venue:
Sladen Legal
The Lantern Building
Tower 2, Level 22/727 Collins St, Docklands, VIC 3008

Part 5: Family trust elections – All that glitters is not gold

Special topic presenter:
Neil Brydges, CTA, Sladen Legal

Family trust elections remain topical for tax professionals and taxpayers, especially as Family Trust Distributions Tax (FTDT) is a focus of the ATO's Tax Avoidance Taskforce Trusts Program for 2025-26. With ongoing industry discussion about family trust issues, it is essential for Next Gen tax practitioners to develop a strong understanding of the fundamentals and compliance requirements. This session will explore key concepts, discuss the ATO's focus areas, and practical scenarios. Attendees are encouraged to bring along practical problems to discuss with the group.

By the end of the session, attendees will:

- Gain a clear understanding of the fundamentals of family trusts in Australia;
- Recognise the purpose and mechanics of key elections - Family Trust Election and Interposed Entity Election;
- Explore the FTDT and when it applies; and
- Learn practical strategies to manage risks effectively.

Thursday 3 December

6:00-7:30pm AEDT
Venue:
To be announced

Part 6: Landmark tax cases

Special topic presenter:
Andrew Spierings, ATI, VIC Bar

This session will provide an in-depth look at landmark tax cases, exploring how judicial decisions have influenced tax policy, compliance, and planning. Participants will gain insights into the reasoning behind these cases and how they continue to impact practice today.

Presenters

Megan Bishop is Tax Partner at Piper Alderman specialising in tax risk management and disputes. She represents Taxpayers that are under review by the ATO or other regulators to advocate for and defend their positions as filed. She has represented taxpayers in all Victorian and Federal Courts, as well as some other State Courts and has been involved in some of the most high profile and precedent setting matters over the last few years. Her areas of specialisation include: employment taxes, trust related tax issues, residency, the R&D tax incentive and anti-avoidance provisions.

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.

Amanda Guruge, CTA, has over eight years' experience in providing taxation advice to a variety of clients, including individuals and small businesses. Amanda has worked at an accounting firm followed by another boutique tax law firm where she continued to develop her taxation skills. Amanda joined Tax Controversy Partners in 2021. Amanda holds a Masters of Taxation (2024), Juris Doctor (2019) and undergraduate degrees in Commerce and Psychology (2016). Amanda holds a current practicing certificate in NSW. Amanda's key interest lies in superannuation. She developed a strong understanding of the complex superannuation rules, administration of SMSFS and providing advice on common issues/transaction to members of SMSFs through her previous experience. With her accounting background, Amanda has experience in preparing and understanding financial reports and tax returns, which assists in providing practical taxation advice.

Vincent Licciardi is a Partner at HWLE Lawyers. He previously worked at the ATO and specialises in the tax affairs of big family businesses. Clients engage Vincent to help in three key areas: To fix the tax problems they face against the ATO, to structure buy-side and sell-side deals tax effectively, and to save advisors from deregistration under the TASA.

Andrew Spierings, ATI, is a barrister at the Victorian Bar. He practises in federal and state taxes, equity and trusts, deceased estates and general commercial disputes. He also accepts briefs in family law matters with significant tax, trusts or commercial issues. Prior to the Bar, Andrew was a Senior Associate in the taxation practice at Arnold Bloch Leibler in Melbourne with experience in a range of income tax, GST and state taxes issues. At ABL, he had an extensive practice in tax advice and disputes, particularly for high-net-wealth families and their groups. He also oversaw day-to-day operation of the firm's national state taxes practice with a particular focus on stamp duties and land tax. Coming from a beef property in West Gippsland, Andrew also has a particular interest in matters with agricultural or related issues. Andrew holds a Bachelor of Laws (with First Class Honours) and a Bachelor of Commerce from Monash University.

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 Next Generation Tax Discussion Group is more than just a program – it is the beginning of a journey. For many of us, it marks our first step with TTI and plays a vital role in shaping our development as trusted advisors in the tax profession. As Chair, I am proud to see this group reborn and thriving. In 2025, I had the privilege of attending sessions filled with energy, collaboration, and genuine engagement. Emerging professionals came together to tackle contemporary issues, share insights, and exchange practical experiences – building not only knowledge but lasting relationships.
Looking ahead to 2026, I am excited for what lies ahead: two additional technical sessions and even more opportunities for the next generation of tax professionals to connect, learn, and grow together. This group is proof that the future of our profession is in capable, inspired hands."

Daniel Angelovich, FTI, Chair, Next Generation Tax Discussion Group, Vic

For event queries please contact the National Events team

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+1300 829 338

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
Full 6 session subscription	☐ $120	☐ $515	☐ $180
Single session	☐ $30	☐ $425	☐ $40

Please select your session/s:

Thu, 12 Feb 44928	☐ Thu, 30 Apr 44929	☐ Thu 4 Jun 44930	☐ Thu, 6 Aug 44931	☐ Thu, 1 Oct 44932	☐ Thu, 3 Dec 44933

Dietary requirements:

Promotional code:

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- access member-only prices to this and future events
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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/NextGen

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

Daniel Angelovich, FTI, Chair, Next Generation Tax Discussion Group Organising Committee

Christian Febbraro, FTI, Piper Alderman

Amanda Guruge, CTA, Tax Controversy Partners

Eric Lay, HWLE Lawyers

Lloyd Miller, Hall & Wilcox

Keira Tweedie, AG Tax Lawyers