The Tax Institute

WA Tax Forum

12-13 Mar 2026

CPD 12

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

Billy-Jo Famlonga, FTI, Famlonga Business Services, Co-Chair, Forum Organising Committee
Modiesha Stephens, CTA, MS Legal, Co-Chair, Forum Organising Committee
Gaurav Chitnis, CTA, HLB Mann Judd
Simeran Cheema, CTA, SEER Financial Group
Mike Cooper, CTA, Australian Taxation Office
Tracey Dunn, EY
Yikai Hoe, CTA, Provident Lawyers
Bill Keays, CTA, Keays Forrest Chartered Accountants
Alan Krawitz, CTA, Smailes Krawitz
Annette Morgan, CTA, Curtin University
Chris Paull, BDO

Proudly supported by:

Welcome

On behalf of the Organising Committee, we are thrilled to invite you to the WA Tax Forum, to be held on 12–13 March 2026 at the Pan Pacific Hotel. As WA's flagship CPD event for tax professionals, the Forum promises insightful presentations, expert-led discussions, and networking opportunities designed to enrich both professional knowledge and meaningful connections.

This year's program features an exceptional lineup of speakers, including interstate experts Neil Brydges, CTA, Sladen Legal and Todd Bromwich, CTA, Hall & Wilcox and Ruth Owen CBE GAICD, Tax Ombudsman. They will be joined by some of WA's foremost tax professionals who will share their expert knowledge.

We are also excited to hear from Anna Longley, ATO Deputy Commissioner, Rob Tomson, Australian Taxation Office Amy-James Valagic, FTI, Australian Taxation Office and Adrian Zuccarini, FTI, Australian Taxation Office who will joining us to provide insights from Australian Tax Office.

Program Highlights

- Cutting-edge technical content from industry leaders, covering the latest in case law, tax consolidations, SMSF succession planning, property development, CGT rollovers, transfer duty and landholder duty.
- A practical guidance session on preparing for the new AML reforms and what you need to know.
- A deep dive into Family Trust Distribution Tax – what's on the radar and practical strategies for FTE management.
- An in-depth panel discussion on the avenues of ATO review available and effective engagement.
- A look at the key issues shaping our profession and how to thrive in the modern landscape.

As always, the Forum provides ample opportunity to build connections and collaborate with colleagues from across the state in a welcoming and dynamic environment. Join us to advance your expertise, engage with the future of tax, and build valuable relationships with peers.

Register now to secure your place at this premier event. We look forward to seeing you and your team, hearing of what's on your radar and exploring how we can best support our Members.

Early bird pricing offer
Register on or before Friday, 13 February 2026 to save!

Billy-Jo Famlonga, FTI
Co-chair, Forum Organising Committee

Modiesha Stephens, CTA
Co-chair, Forum Organising Committee

Technical program

Day 1 Thursday, 12 March 2026

Time *AWST	Session
8.00 – 8:30am	**Registration**
8:30 – 8:45am	**Welcome and President's address** **Speakers: Billy-Jo Famlonga, FTI, Co-Chair, Forum Organising Committee, Tim Sandow, CTA, President, The Tax Institute**
8:45 – 9:30am	**Session 1: Walter Gianotti Memorial address** **Speaker: Anna Longley, Australian Taxation Office** Our opening session continues to honour Walter's vision of collaboration between the ATO and the tax profession. In this year's address, Deputy Commissioner Anna Longley will reflect on the importance of partnership between advisers and the ATO in supporting a sustainable tax system. This session will explore how shared responsibility, and open engagement can help address emerging challenges such as sustaining payment culture, supporting taxpayers experiencing vulnerability, and maintaining trust in the system. Anna will offer perspectives on the important role tax professionals play alongside the ATO in assisting taxpayers to meet lodgement and payment obligations and the ATO's continuing commitment to working with the profession to meet the needs of taxpayers, tax professionals and the community.
9:30 – 10:30am	**Session 2: Disputes – How to handle vulnerability** **Panellists: Ruth Owen, CBE GAICD, Tax Ombudsman, Rob Thomson, Australian Taxation Office** **Facilitator: Annette Morgan, CTA, Curtin University** This session explores the intersection of dispute resolution and client vulnerability in taxation practice. Drawing on real-world experience and the ATO's new *Vulnerability Framework* (October 2025), the panel will discuss how practitioners can identify and manage vulnerability with empathy and professionalism and will explore the following: • Managing disputes involving vulnerable clients and those involving the ATO, where vulnerability may impact communication or decision-making; • Applying the ATO's *Vulnerability Framework*; • Practical strategies for de-escalation, maintaining impartiality, and achieving fair outcomes; and • Navigating government and cross-agency supports for vulnerable taxpayers.
10:30 – 11:00am	**Morning tea**

Technical program

Day 1 Thursday, 12 March 2026 continued

Time *AWST	Session	
11:00am–12:00pm	**Session 3A: Structuring and succession planning for SMSFs** **Speakers: Loreena Gillon, CTA, Arithmos Chartered Accountants, Modiesha Stephens, CTA, MS Legal** A great deal of time and effort is often invested in the tax strategies and financial planning of self-managed superannuation funds (SMSFs). However, detailed consideration of the structure of SMSFs is sometimes overlooked when planning for the incapacity or death of a member. This session will explore the issues to consider prior to and following the death or incapacity of a SMSF member including: • Control of the SMSF upon death or incapacity of a member; • Power and constraints on the executor; • How does a member ensure the funds go to the intended beneficiaries; and • What tax is payable, by whom, and what steps can the member take to reduce the tax burden on death.	**Session 3B: Tax consolidations – When it works and when it doesn't** **Speaker: Corey Beat, CTA, Crowe** Tax consolidation can offer real benefits, but it isn't always the best fit. This session will look at when tax consolidation achieves the intended outcomes and benefits, when it can create challenges or costs, and the key considerations before making a choice to consolidate or to not consolidate a group.
12:00–1:00pm	Lunch	
1:00–2:00pm	**Session 4A: Property development matters** **Speaker: Amy James-Velagic, FTI, Australian Taxation Office, Adrian Zuccarini, Australian Taxation Office** The ATO's areas of focus in the property sector are guided by risks and issues identified through intelligence gathering, risk detection and analysis, and casework outcomes. This session will explore: • The key property and construction issues currently attracting ATO attention; • The recently published draft practical compliance guidelines on the recognition of income under property development agreements involving long-term construction contracts; and • How the ATO is working to ensure a level playing field and help taxpayers in the property industry get it right.	**Session 4B: International tax issues – Scale up** **Speaker: Ryan Hammersley, RSM Australia** As businesses expand globally, managing cross-border tax obligations becomes increasingly complex. This session will explore the key international tax considerations for growing businesses and how to manage them effectively. This session will cover: • Financing foreign operations; • How the controlled foreign company (CFC), permanent establishment and tax residency rules can impact foreign expansion; • Managing double taxation and the impact of double tax agreements (DTAs); and • How to tax-effectively bring profits from foreign operations back to Australia.

Technical program

Day 1 Thursday, 12 March 2026 continued

Time *AWST	Session	
2:00 – 3:00pm	**Session 5A: Div 149 and application to discretionary trusts** **Speaker: David Montani, CTA, Grant Thornton** After more than 40 years, there are still many discretionary trusts holding assets acquired before 20 September 1985. Are they still pre-CGT? It should not be assumed so. Generational and other changes present challenges in supporting that majority underlying interests have been maintained since 1985. This session will cover: • The relevant Division 149 concepts in the context of discretionary trusts; • The Commissioner's statutory power to determine where majority underlying interests have been maintained; • The Commissioner's past approach in rulings and Edited Private Advice to applying the above power in relation to discretionary trusts; • Based on a recent ART case, is the Commissioner seeking to deviate from his past approach? • Effect of CGT roll-overs or death, as relates to discretionary trusts, including testamentary trusts; and • Consequences where an asset has lost its pre-CGT status.	**Session 5B: Decoding CGT roll-overs, transfer duty and landholder duty** **Speaker: Tom King, Smailes Krawitz** This session covers the pointy end of a restructure, including practical examples, tips, traps and frontier issues in navigating CGT and transfer duty in Western Australia in restructuring private groups.
3:00 – 3:30pm	**Afternoon tea**	
3:30 – 4:30pm	**Session 6: Anti-Money Laundering** **Speaker: Fiona Halsey, Halsey Legal Services** This session will explain the reforms to the *Anti-Money Laundering and Counter-Terrorism Financing Act* 2006 (Cth) which will take effect on 1 July 2026 and how this will impact tax practitioners (both accountants and lawyers) including: • Overview of AML/CTF obligations; • Recognising Money Laundering/Terrorism Financing risks and the key obligations for reporting entities (including what needs to be put into practice); and • Identify practical ways to prepare for regulation and strengthen business readiness for AML/CTF compliance.	

Technical program

Day 1 Thursday, 12 March 2026 continued

Time *AWST	Session
4:30–5:30pm	**Session 7: Big end of town issues affecting SMEs** Speaker: Neil Brydges, CTA, Sladen Legal Discover how debt deduction creation, thin capitalisation, and transfer pricing rules, once reserved for corporates, now target high net worth (HNW) private groups. Learn to navigate ATO's Next 5000 and Top 500 reviews, meet public group compliance standards, and shape proactive strategies. Address ATO hot topics, data-driven scrutiny, and resource challenges to stay ahead in this evolving tax landscape. Equip yourself with practical tools to prepare clients for inevitable audits, mitigate penalty risks, and adapt to global tax trends influencing Australia's HNW space.

Networking reception

Join your colleagues, peers and our esteemed presenters for an evening of drinks, canapes and networking.

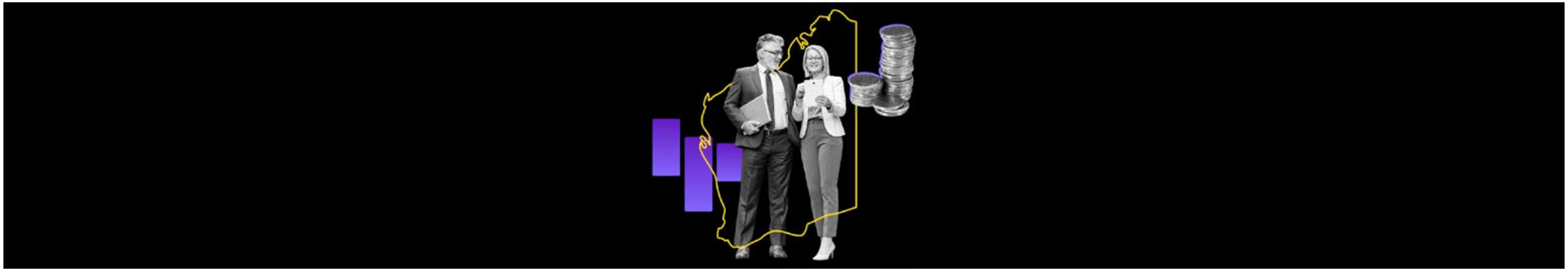
Date: Thursday, 12 March 2026
Time: From 5:30pm
Venue: Pan Pacific Perth
Price: Inclusive for all full registration delegates
$80 for additional tickets – see registration form for details
Dress: Business or Business casual

Proudly Supported by: SCEALES LAWYERS

Technical program

Day 2 Friday, 13 March 2026

Time *AWST	Session
9:00 – 10:00am	**Session 8: ATO avenues of review** **Panellists: Anna Longley, Australian Taxation Office, Neil Brydges, CTA, Sladen Legal, Gaurav Chitnis, CTA, HLB Mann Judd** **Facilitator: Andrew Giorgi, FTI, Smailes Krawitz** This collaborative panel session will be a deep dive into the various procedures and approaches taxpayers, and their advisors, can pursue to seek review of decisions which affect them. This session will provide perspectives of the Deputy Commissioner of Frontline Risk & Strategy and address the following: • The 'Part IVC' dispute process, including what type of disputes can be objected to and how those disputes can be brought to independent forums; • The state of play with GIC remission requests and how the ATO is treating them, what are the statutory grounds which can be relied upon and what resources an advisor can rely on to assist their applications being viewed favourably; and • A granular consideration of tax debt recovery including director penalty notices and their defences, the ATO's current approach to recovery, what is happening with 'on-hold' debts and steps an advisor can take to soften the blow for clients with long-standing debt issues.
10:00 – 11:00am	**Session 9: Trusts and section 99B – An advisor's guide of issues** **Speaker: Todd Bromwich, Hall & Wilcox** In an ever-shrinking world and increased global mobility of individuals, cross-border trust issues once confined to the top end of town are increasingly relevant to more advisers and their clients. Trusts are, and will continue to be, vehicles used in Australia and abroad for asset protection and to facilitate the transfer of wealth across borders and family generations. The rules in this space are complex, it is an area of ATO compliance activity, and outcomes do not always align with common sense policy objectives. This session will include discussion of: • Residency of trusts, including common pitfalls when structuring arrangements and succession planning; • Taxation of trust income and capital distributed to Australian resident beneficiaries, including ATO views in TD 2017/23, TD 2017/24, TD 2024/9 and PCG 2024/3 • High level discussion of the application of the transferor trust rules to tax offshore trust income on an attributed accruals basis; and • Essential documentation, best practice trust administration and surviving ATO scrutiny.



Technical program

Day 2 Friday, 13 March 2026 continued

Time *AWST	Session
11:00–11:30am	**Morning tea**
11:30am–1:00pm	**Session 10: Hot topics round up** This three-part session will provide an update on the latest tax topics impacting practitioners today. **Part 1 – Tax Policy & Advocacy update** **Speaker: Julie Abdalla, FTI, The Tax Institute** This session will provide an update on the issues the Tax & Policy Advocacy team are currently focussed on. **Part 2 – Tax Ombudsman update** **Speaker: Ruth Owen, CBE GAICD, Tax Ombudsman** This session will provide an update on recent submissions and cases that are on the radar for the Tax Ombudsman. **Part 3 – Div 296 update** **Speaker: Jemma Sanderson, CTA, Cooper Partners** This session will outline the announced changes to Div 296 and how they will impact your clients, including a comparison of the announced changes to the previous draft measures.
1:00–1:45pm	**Lunch**
1:45–2:45pm	**Session 11: Family Trust Distribution Tax** **Speaker: Tracey Dunn, EY** The heightened focus of the ATO on discretionary trusts and family trust elections (FTEs) is leading to unintended outcomes, with an increasing number of taxpayers facing significant tax liabilities for family trust distributions tax (FTDT) in circumstances where ‘distributions’ have been made outside of the ‘family group’. Complex legislation, combined with the challenges that can arise from deficiencies in record keeping, no statutory amendment period and no legislative discretion for the Commissioner to disregard a distribution for FTDT purposes has led to a ‘perfect storm’, potentially wiping out family wealth and putting tax agents at risk. This session will explore the potential adverse tax implications of making a distribution outside of the ‘family group’ and provide practical strategies for advisors in understanding and managing FTEs. This session will cover: • Making valid FTEs and record keeping considerations; • The broader meaning of ‘distribution’ in the context of FTDT; • The original intent and purpose of the trust loss rules and whether the Commissioner can provide relief under his general administrative powers. • Key takeaways from recent case law concerning FTEs and FTDT; and • The recent ATO focus on the 45-day holding period rule specifically in the context of newly incorporated beneficiaries; are franking credits at risk.

Technical program

Day 2 Friday, 13 March 2026 continued

Time *AWST	Session
2:45–3:00pm	**Afternoon tea**
3:00–4:00pm	**Session 12: The current state of play of the tax profession** Panellists: Tracey Dunn, EY, Billy-Jo Famlonga, FTI, Famlonga Business Services, Tim Sandow, CTA, President, The Tax Institute Facilitator: Annette Morgan, CTA, Curtin University The tax profession is evolving rapidly amid regulatory reform, technological change, and shifting client expectations. This session brings together leading voices from practice and academia to explore how practitioners and advisers are adapting to an increasingly complex environment. Panellists will discuss current challenges and opportunities, including the impact of digital transformation, enhanced regulatory oversight, the industry skill shortage, and succession planning concerns as experienced professionals exit the workforce. The session will also examine professional integrity, adaptability, and the skills required to thrive in the modern tax landscape, with a focus on building a sustainable talent pipeline and preparing the next generation of tax leaders.
4:00pm	**Forum close**

Presenters

Julie Abdalla, FTI, is the Head of Tax & Legal at The Tax Institute. Julie has practiced in the tax teams of Big 4 and top tier law firms in Sydney and Melbourne, and at an international law firm in London. She has expertise in law and policy across a broad range of taxes and industry sectors. Julie is driven to achieve holistic tax reform, and has the depth of knowledge to advocate for members and the betterment of the tax system. Julie leads the Tax Policy & Advocacy team and has oversight of The Tax Institute's National Technical and State Taxes Committees comprised of over 150 volunteers. She represents The Tax Institutes in several external forums including the ATO's National Tax Liaison Group and the Australian Treasury's Tax Treaty Advisory Panel. Julie provides strategic and technical advice to Government and other stakeholders, and has appeared as an expert witness in several Senate Committee inquiries. Julie has been recognised throughout the profession for her leadership and excellence in tax. She has been awarded a number of scholarships and awards including the International Bar Association Taxes Committee Scholarship, the Australian Lawyers Weekly 30 Under 30 Award in Tax, and a prize from the University of Oxford. Julie holds a Bachelor of Arts and a Juris Doctor from the University of Sydney, and a Master of Laws from the University of Melbourne, part of which was completed at the University of Oxford.

Corey Beat, CTA, is a Partner in the Perth Tax Advisory division of Crowe Australasia. Corey has over 20 years' experience in providing taxation advice and specialist tax consulting services, covering a diverse array of issues, including domestic and cross-border income tax issues, CGT, GST and employment tax issues. Corey was previously chair of The Tax Institute's Professional Development Committee in Western Australia, and was a finalist in The Tax Institute's SME Tax Adviser of the Year Awards in 2018.

Todd Bromwich is a Special Counsel in Hall & Wilcox's Tax team with extensive experience advising clients on strategic tax planning and structuring, and managing early-stage and litigated disputes with Federal and state taxation authorities. Todd has a particular focus on the taxation of trusts and international private wealth taxation for individuals and family groups, assisting clients to structure their global wealth and advising on tax-effective succession planning. Todd is also a senior member of Hall & Wilcox's cross-practice Charities, Not-for Profit & Philanthropy team, assisting individuals and family groups to achieve their philanthropic goals.

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.

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.

Billy-Jo Famlonga, FTI, is the founder and principal of Famlonga Business Services. With over 15 years' industry experience her practice focuses on taxation compliance, business structuring, succession planning, not-for-profits and providing a comprehensive suite of additional services to the SME market including specialising in business technology and process automation. Billy advises clients across a diverse range of industries, including primary production, freight

Presenters

and logistics, digital assets, retail and the NDIS sector. Billy holds a Graduate Diploma of Applied Tax Law and is a Fellow Member of The Tax Institute and the Institute of Public Accountants. Billy serves as the current Vice Chair of The Tax Institutes WA State Council and is actively involved in many of WA's local working groups, including Women in Tax, Emerging Leaders and Local Engagement.

Loreena Gillon, CTA, is the Director of Arithmos Chartered Accountants, a niche chartered accounting firm operating in West Perth, and has done so for the past 27 years. Arithmos Chartered Accountants has a client base representing a number of professions, all of whom operate & manage their business affairs through various structures, including Trusts and Self Managed Superannuation Funds. Prior to establishing her chartered accounting practice Loreena worked for accounting firms in the business services area. Loreena's area of special interest is Deceased Estates, and she is a regular presenter for a number of professional bodies.

Andrew Giorgi, FTI, is a tax and commercial lawyer with Smailes Krawitz. Andrew routinely acts in tax and duty audits, investigations and disputes for a wide range of clients. This includes high-value tax debt matters, protracted evidentiary disputes and tax prosecutions. Additionally, Andrew acts in private client matters including family trust and company disputes, complex estate planning and the drafting of commercial documents. Andrew was awarded a Master of Taxation Law with Distinction from the University of Western Australia.

Ryan Hammersley is a Senior Manager in RSM Australia's Tax Services division. Prior to joining RSM, Ryan worked in the Perth and Sydney offices of a Big 4 firm. Ryan has over a decade of experience in advising on the tax implications of cross-border arrangements. His clients range from start-ups to some of the worlds largest businesses. Ryan is a Chartered Accountant and a Solicitor in the Supreme Court of Western Australia.

Fiona Halsey has been a solicitor since 1993 and is a director of Halsey Legal and leader of PerthAML. She has been a State Chairperson, State Councillor, National Councillor, Head of the WA Technical Committee for The Tax Institute and a director at EY. Fiona is a Certified Anti-Money Laundering Specialist (ACAMS). She is a member of the Law Society AMLCTF working group, a member of the Law Council AMLCTF working group, and a member of the Association of Certified Anti-Money Laundering Specialists. She is experienced in conducting AMLCTF evaluations, preparing AMLCTF policies and procedures, software acquisition, risk assessments, and advises on AMLCTF generally.

Amy James-Velagic, FTI, started her career in a large advisory firm in corporate tax. She then joined the Australian Taxation Office and has worked across a range of areas including large business, GST, private wealth and objections and review. In her current role, Amy has national responsibility for the Tax Avoidance Taskforce – Trusts Risk and Strategy and Engagement and Assurance teams, and the delivery and implementation of Modernisation of Tax Administration Systems (MTAS) project across the ATO. In addition, she leads the property and construction risk and strategy team (both income tax and GST).

Tom King is a private clients lawyer, with expertise in tax, trusts, estates and commercial law. He provides technical tax, trusts and estates advice to high net worth individuals, family groups and corporate entities. Tom acts for taxpayers at every stage of review and at audit. He has acted in tax, trusts and superannuation disputes in the Administrative Appeals Tribunal and the Supreme Court of Western Australia. Known as a problem solver at heart, Tom's clients benefit from his knack for finding the way forward through legal frameworks. Tom is admitted as a lawyer of the Supreme Court of Western Australia. He holds a Bachelor of Commerce (Professional Economics) and a Juris Doctor from the University of Western Australia, where he tutors in taxation law.

David Montani, CTA, is National Head of Technical Tax – Private Enterprise at Grant Thornton. He has over 30 years' experience, with over 20 of those in specialist tax advisory. In his role with GT, David delivers practical tax training, mentors staff, provides tax technical support on significant client engagements, and assists with quality and excellence protocols

Annette Morgan, CTA, 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

Presenters

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.

Anna Longley is Deputy Commissioner, Frontline Risk and Strategy. In this role, Anna is responsible for setting strategic direction for the Frontline Operations group, particularly on registration, lodgement and payment, and managing external stakeholder engagement. Previously, Anna has worked on lodgement and enforcement strategies, providing recommendations on the ATO's strategy for ensuring timely lodgement of taxation obligations, and tailored strategies for enforcing high-risk debts, and in a number of Assistant Commissioner roles in the Private Wealth business line, across Behaviours of Concern, Engagement and Assurance, and Technical Advice and Guidance. From 2019 until 2023, Anna was Assistant Commissioner General Counsel at the Australian Charities and Not-for-profits Commission. In that role, Anna was the senior legal adviser to the ACNC Commissioner, was a member of the ACNC Executive and Performance, Audit and Risk Committee, and had operational leadership of the ACNC. Anna also has significant experience in administrative law, dispute resolution and litigation.

Ruth Owen CBE GAICD was appointed to the role of Inspector-General of Taxation and Taxation 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. In moving to Australia, Ruth joined EY Advisory as the lead partner in Human Resources Services, providing professional services to Government and community sector clients, including publishing guidance on complaints management and supporting the National Redress Scheme for survivors of institutional child sexual abuse. 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.

Jemma Sanderson, CTA, is a Director of Cooper Partners Financial Services, heading up their SMSF specialist services. Jemma provides strategic advice on SMSFs, estate planning and wealth management to clients, as well as technical support and consultancy to accounting, legal and financial planning groups. Jemma has over 20 years' experience and is a regular presenter on superannuation and SMSFs for the professional bodies across the country, and is the author of The Tax Institute's popular publication for SMSF Advisers, the SMSF Guide, in its ninth edition. Jemma received a TTI Community Service Award in 2024 for her contribution to the industry.

Tim Sandow, CTA, has over 30 years of experience as a tax professional, including 25 years in the Big 4. He provides income tax related advice to a variety of private and large public companies as well as multi-nationals. He has advised on mergers & acquisitions, tax governance, corporate tax, international tax, and employment tax issues. Tim is also the Partner leading BDO's National Tax Risk & Ethics group. Tim is a CTA of The Tax Institute and a Chartered Accountant Fellow and the SA representative on the National Board of The Tax Institute. Tim is the current President of The Tax Institute and a regular presenter at numerous Tax Institute conferences and events.

Modiesha Stephens, CTA, is a Director at MS Legal practicing in Taxation, Commercial Law and Estate Planning. Modiesha has over 25 years' experience in advising SME and individual clients in all areas of State and Federal taxation with a particular emphasis on transactional tax advice, including income tax, CGT, GST, transfer duty and other State taxes. Modiesha also practices in estate and succession planning and general commercial law. In addition to being a Chartered Tax Adviser, Modiesha has degrees in law and commerce and a Master of Laws. Modiesha is an avid supporter of the Tax Institute having served on various committees over the years and is the current WA representative on National Council.

Presenters

Robert Thomson is the Assistant Commissioner for Government, Experience and Tailored Support – Individuals and Intermediaries and is leading the ATO Vulnerability Capability. For the last two years, Rob represented the ATO as the official Tax Time spokesperson. An experienced tax professional with over 10 years experience, Rob spent time as Minister Counsel (Taxation) at Australia's Permanent Delegation to the Organisation for Economic Co-operation and Development (OECD) in Paris and he has extensive experience across several diverse roles in the ATO. Starting at the ATO as a Post Grad in High Wealth Individuals, Rob progressed to a compliance officer role, then worked his way into specialist taskforces, policy implementation and strategic programs. Rob holds a Masters of International Taxation and a Bachelor of Commerce (B.Com). Prior to joining the ATO, Rob worked in a managerial role for a not-for-profit foundation in New York.

Adrian Zuccarini, FTI, is an Assistant Commissioner within the Tax Counsel Network with over 18 years' experience at the ATO. He provides technical support and guidance on a range of complex issues within private business structure with expertise in taxation issues relating to Professional Firms, trusts, Capital Gains Tax, Division 7A and Part IVA. Adrian has a Business Degree with First Class Honours in Taxation as well as a Master of Law (Juris Doctorate) from Monash University.

Venue and accommodation

Pan Pacific Perth

207 Adelaide Terrace, Perth WA 6000

Experience the heartfelt warmth and hospitality that radiates through Pan Pacific Perth. The fully renovated meeting rooms and guest rooms add a sense of elevated luxury to our Perth hotel, centrally located on Adelaide Terrace and just steps away from the city's best shopping and dining attractions.

Getting there

This hotel is situated in the east end of Perth CBD, with multiple free CBD bus routes going past. Check out the TransPerth website for the best route.

The Pan Pacific Perth is approximately 12km's and a 20–30-minute drive from Perth airport. Delegates can take advantage of a plethora of travel options, including bus, train, taxi or private car.

Parking

Parking is available at the Pan Pacific Hotel. More information around parking options will be communicated to delegates in the lead up to the event.

Accommodation

To book accommodation please follow the link: Pan Pacific Accommodation.

Please refer to the Pan Pacific Perth cancellation policy when booking. All hotel charges and incidentals, including breakfast, remain the responsibility of delegates, and individuals will be responsible for payment of the balance of their account when checking out of the hotel. Please note that extra charges may be incurred for additional guests and will be charged to individual room accounts upon checkout.

Event information

Confirmation of registration

Please note you will receive two separate emails in the form of a tax invoice at the time of payment and a confirmation email at registration completion.

Continuing Professional Development (CPD)

Attendance at the event counts for 12 hours of CPD with The Tax Institute.

Legal Practitioners with the LPBWA

The WA Tax Forum is a recognised LPBWA CPD activity. Delegates can earn up to 12 hours of CPD activity for attendance. To ensure your CPD activities are uploaded on your behalf to the LPBWA, please contact The Tax Institute post-event with your practitioner ID at nationalevents@taxinstitute.com.au.

The Tax Institute's attendee hub

This event will be accessible to all delegates via our dedicated attendee hub. Program information, materials (technical papers and presentations), survey forms and more will be available via The Tax Institute's virtual attendee hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the attendee hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual attendee hub by email.

Delegate list

A delegate list will be included on the attendee hub to assist with networking. Please indicate at the time of registration if you do not want your name to be included. Alternatively, you can edit your profile visibility settings in the virtual attendee hub at any time during the event.

Dress code

Business or business casual attire is suitable for the duration of the conference.

Special dietary and accessibility requirements

Please indicate any special dietary requirements at the time of registration. Please email us with any accessibility requirements at nationalevents@taxinstitute.com.au.

Networking reception

The forum's Networking reception will be held directly following the last session on Thursday, 12 March at the Pan Pacific Perth. The networking function is included in the event registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of $80. Please indicate your requirements, including dietary requirements, at the time of registration.

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control, including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

Privacy

We take your privacy seriously, and our policy can be viewed at: https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer.

Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or nationalevents@taxinstitute.com.au.

For registration enquiries, please contact customeradmin@taxinstitute.com.au.

Registration

Registration options and inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ lunches	Networking reception*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Day registration This registration option entitles one delegate to attend one full day of technical sessions.	✓	✓	
Employer registration This registration option allows one registration to be shared between multiple attendees from the same firm.	✓		

*Additional tickets to the Networking function can be purchased on the registration form.

Register now!

Register online ▶

Register via form ▶
included in this brochure

Discounts

Early bird registration

All registrations received and paid on or before Friday, 13 February will be entitled to an early bird discount.

Please note: The registration fee does not include accommodation, hotel incidentals or transfers.

Group discount

Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

The Tax Institute

WA Tax Forum
Registration form

44827 | WD

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 see page 17 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 13 February 2026	☐ $1,695	☐ $2,090	☐ $1,995
Standard registration Register after Friday, 13 February 2026	☐ $1,895	☐ $2,290	☐ $2,195

☐ I understand that the registration fees do not include printed materials. Access to materials will be electronic.

Networking reception

The networking reception is INCLUDED in the registration fee for delegates attending the full event.

12 March 2026 at the Pan Pacific Perth

☐ Yes, I WILL be attending the networking reception OR

☐ No, I WILL NOT be attending the networking reception

☐ Yes, I require additional tickets for the networking reception at $80 per person

No. ______ x tickets at $80 each: $ ______

Dietary requirements:

______

***Become a member and save!**

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and:

- save over $230 on Affiliate membership on the first 12 months
- access member-only prices to this and future events
- access all member-only technical resources.

Find out more about membership at taxinstitute.com.au/membership

JOIN TODAY

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 Breakout session options

Please tick the breakout sessions you would like to attend during the event:

Thursday, 12 March 2026

11:00am–12:00pm
☐ Session 3A: Structuring and succession planning for SMSFs
☐ Session 3B: Tax Consolidations – When it works and when it doesn't

1:00–2:00pm
☐ Session 4A: Property development matters
☐ Session 4B: International tax issues – Scale up

2:00–3:00pm
☐ Session 5A: Div 149 and application to discretionary trusts
☐ Session 5B: Decoding CGT roll-overs, transfer duty and landholder duty

26-004EVT_11/25

4 Payment summary

Registration fees	$
Additional guest tickets – Networking reception ($80 each)	$
Total payable	$

Please note: The Tax Institute cannot accept responsibility for delegates' late flight arrivals. Transfer costs are non-refundable and non-transferable.

5 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 ☐ Diners

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.

For event enquiries, please contact the National Events Team on **1300 829 338** or nationalevents@taxinstitute.com.au

For registration enquiries, please contact customeradmin@taxinstitute.com.au

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

WA Tax Forum Employer Ticket
Registration Form

The Tax Institute

44827 | WD

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 Employer Ticket types

Employer tickets offer a flexible option for employers to send multiple attendees to an event.
We have different options to suit you and your team.

	Classic	Plus	Premium	Tailored
Early bird on or before Friday, 6 March	$3,450	$4,950	$6,450	
Standard after Friday, 6 March	$3,650	$5,150	$6,650	
Best for	SME	Mid-Tier	Corporate	Large/National
Flexibility	Your choice of 30 sessions	Your choice of 45 sessions	Your choice of 60 sessions	Contact us to tailor a quote today for you and your team to attend multiple events.
Team attendance	Up to 10 attendees	Up to 15 attendees	Up to 20 attendees	
Session formats	Face-to-face	Face-to-face	Face-to-face	
Networking	5 networking passes	10 networking passes	15 networking passes	

All Employer Ticket attendees receive:

- Electronic access to download available technical papers and presentations
- Morning tea, lunch and afternoon tea
- CPD hours allocated according to attendee

1 session = 1 CPD hour per attendee

Session selection

- Coordinators will be contacted with a session selection form to complete on behalf of attendees, based on the Employer Ticket type selected.
- The session selection form must be completed in full to ensure proper allocation of CPD hours post-event.

1 Employer Ticket types

Promotional code: ____

Ticket type	Cost	No. of tickets	Sub-total
☐ Classic			
☐ Plus			
☐ Premium			
		Total payable $	

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 ☐ Diners

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

26-004EVT_11/25

The Tax Institute

Join the conversation

linkedin.com/school/the-tax-institute

facebook.com/thetaxinstitute

twitter.com/taxinstituteoz

instagram.com/thetaxinstitute_

taxinstitute.com.au