

Local Tax Club Townsville

21 March – 28 November 2024

Findex, Townsville

1.5 CPD hour per session

Breakfast Club series



Local Tax Club

The latest tax knowledge, hot topics and local networking

Being part of your Local Tax Club will keep you on top of the latest tax knowledge, enable connections with peers in your local community and provide you with the opportunity to extend your own professional and personal network.

This series includes 5 sessions, happening monthly from March to November. Each session features a specialist tax topic presented by a subject matter expert, and a monthly tax update to keep you on top of Australia's ever changing tax legislation.

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.

Being part of your Local Tax Club will not keep you on top of the latest tax knowledge connect you with your peers, and fellow members of your tax community.

Register for your Local Tax Club today! Gain valuable resources, stronger connections, and all the latest knowledge in tax.

Who should attend?

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

Schedule

21 March – 28 November 2024

Findex, Townsville

1.5 CPD hours per session

Registration options

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.

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 21 March 7.30-9.00am AEST Findex Level 5/22 Walker Street, Townsville	Part 1: Trust issues As users of trusts, we have been inundated in recent times with s100A, s99B and to a lesser extent Division 7A. Tax issues aside, trustees are under age old obligations to administer a trust in accordance with terms of the trust imposed upon them. This session is intended to cover important commercial considerations (and some tax ones) that should be taken into account in respect of the ongoing use of trusts: <ul style="list-style-type: none">• Asset protection (<i>Richstar</i>), family law (<i>Spry</i>) and payroll tax (<i>Smeaton Grange</i>) considerations• What does it mean to consider beneficiaries (Owies) and what should distribution minutes look like; and• Part IVA and distributions in discretionary trusts.	Speaker: David Hall, CTA, Findex
Thursday 23 May 7.30-9.00am AEST Findex Level 5/22 Walker Street, Townsville	Part 2: Family trust elections Family Trust Elections and Interposed Entity Elections have been around for decades but have been little understood. As family groups go through intergenerational transitions the importance of these elections and dealing with their effect has become critical. The ATO are now starting to show an awareness of the issues that arise both from the lack of the elections and from distributions that may trigger family trust distribution tax. Given the unlimited amendment period, for family trust distribution tax– this session is must know for family advisers. This session, will highlight when a Family Trust Election and Interposed Entity Election are required and the issues that arise once these are in place.	Speaker: David Hall, CTA, Findex
Thursday 1 August 7.30-9.00am AEST Findex Level 5/22 Walker Street, Townsville	Part 3: Highlights from 2024 Qld Tax Forum - Trusts, death, divorce and restructures	Speaker: Scott Vollmerhause, PVW Partners

**Thursday
3 October**

**Part 4: Issues that arise in estate administration and reorganising
deceased's affairs post death**

Speaker:
Jarrad Mobbs, MobbsMarr Legal

7.30-9.00am AEST
Findex
Level 5/22 Walker Street,
Townsville

The presentation will focus on 2 practical deceased estate administration problems including issues that arise in deeds of family arrangement, appropriation powers in wills, settlement of claims in estates and the relief available to executors and trustees of deceased estates touching on legal, duty and taxation considerations.

**Thursday
28 November**

Part 5: More information coming soon

Speaker:
Speaker to be announced

7.30-9.00am AEST
Findex
Level 5/22 Walker Street,
Townsville

Presenters

David Hall, CTA, is a Tax Partner at Findex and Crowe Australia based in Townsville. David regularly advises on restructures, succession arrangements, and business sales and acquisitions to ensure clients achieve their personal aims and tax-effective outcomes. David is an expert on the small business CGT concessions and the agri-sector, and regularly deals with a large number of the firm's agri-clients and as such has extensive experience in dealing with the tax consequences of the changing landscape for agri clients and the use of their land. David has over forty years' of experience advising in the private wealth space primarily SBEs in the agricultural and ag-supply industries.

“The Local Tax Club is a great opportunity to understand not only the technical issues, but also how other professionals are dealing with the issues both practically and commercial”

Michelle Hartman, CTA, PwC

For event queries please contact
qld@taxinstitute.com.au

Register now!



Scan the code to
purchase your tickets!



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 series 5 pack	<input type="checkbox"/> \$350	<input type="checkbox"/> \$720	<input type="checkbox"/> \$500
Single session	<input type="checkbox"/> \$100	<input type="checkbox"/> \$470	<input type="checkbox"/> \$150

Please select your session/s:

Thu, 21 Mar 43939
 Thu, 23 May 43942
 Thu, 1 Aug 43943
 Thu, 3 Oct 43944
 Thu, 28 Nov 43945

To register for a single session please complete this registration form and email to customeradmin@taxinstitute.com.au

Dietary requirements:

Promotional code:

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- up to **50% off membership** to 30 June 2024
- member-only prices to this and future events
- free access to member-only technical resources.

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

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature:



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:

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

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To register

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