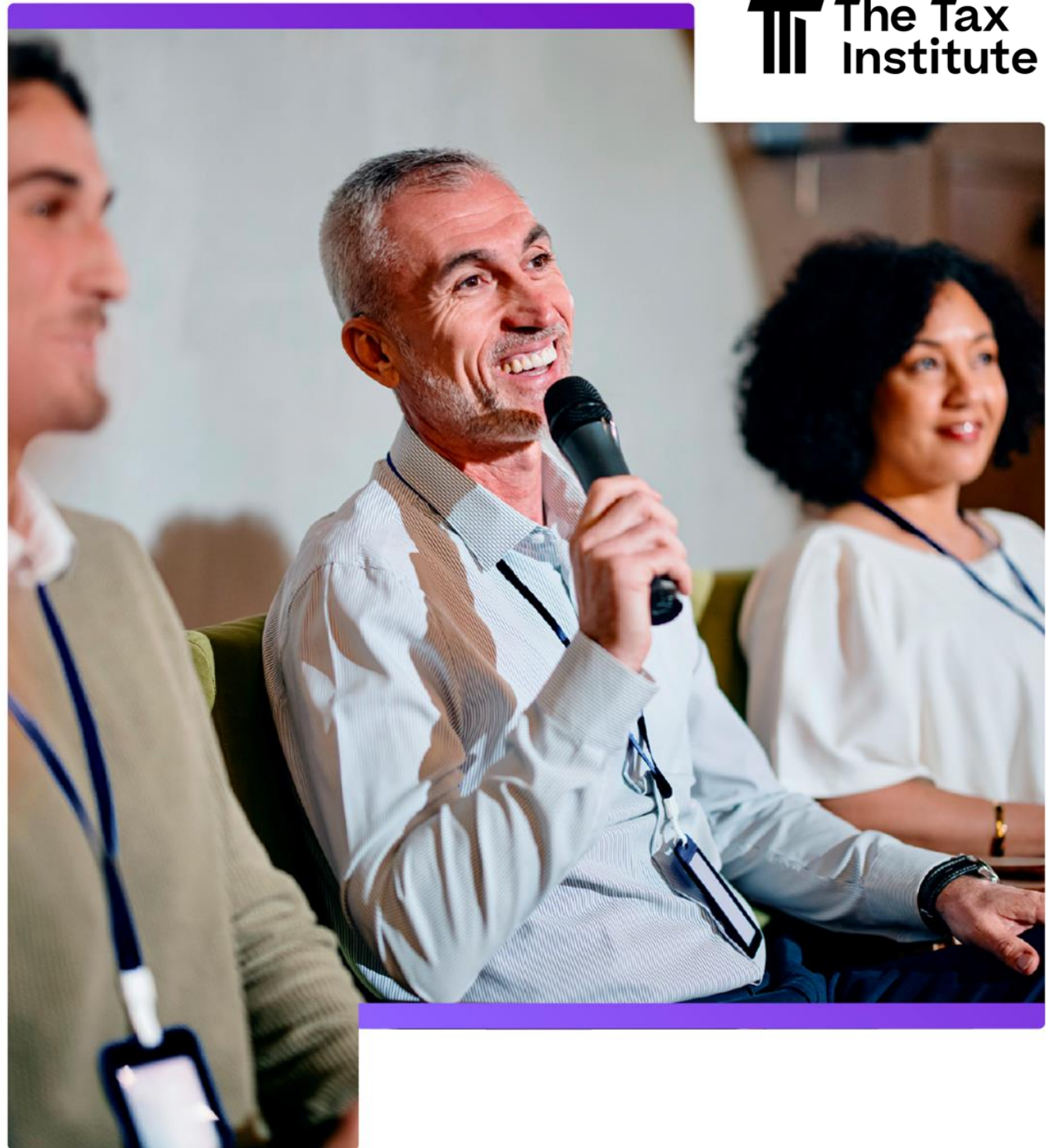


Tax in practice – Is tax planning dead?

1 August 2024

McCullough Robertson Brisbane

1.5 CPD hours



Event overview

Date/Time	Session	Presenters
Thursday 1 August 5:00 - 6:00pm AEST	Is tax planning dead? Hear from local tax experts, connect with peers, and learn about the latest developments On behalf of the Queensland State Council, we invite you to a twilight panel discussion and networking. Our panel of experts will discuss the vexed question of 'what is permissible tax planning?' Topics that will be covered include: <ul style="list-style-type: none">• Examples of legitimate tax planning versus risky tax planning• Why NOT to leave tax planning until June• Impact of recent Part IVA cases involving Qld taxpayers; and• How to mitigate risks as advisers.	Facilitator: Joanne Casburn, FTI, Mage Advisory Panelists: Michael Garrone, CTA, Mage Advisory David Hughes, CTA, McCullough Robertson Victoria Mercer, BusinessDEPOT

Where is the line? Is tax planning dead? When what is acceptable and what isn't is constantly changing, how can you mitigate your risks as advisors? Our expert panel will explore these issues and provide practical insights relevant to every practitioner. Queensland's second Tax in Practice for 2024 is one not to be missed!



Networking opportunities

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

Pre-registration beverages: 4:30 - 5:00pm

Panel Discussion: 5:00 - 6:00pm

Networking hour: 6:00 - 7:00pm

Venue: McCullough Robertson, Level 11/66 Eagle Street Brisbane City, 4000

Dress: Business casual

Presenters



Joanne Casburn, FTI, is a Specialist Advisory at Mage Advisory, specialising in tax dispute resolution and litigation, including recent disputes involving trust issues such as section 100A, section 99B and Part IVA. She has over 30 years of experience, with 10 years as a former ATO Assistant Commissioner. In the ATO, Joanne who was responsible for the leadership of the private wealth audit teams in Queensland including Part IVA matters that have recently been decided in the Federal Court. Joanne was recognised in 2020 as a finalist in The Tax Institute's SME Tax Adviser of the year awards. She is also a State Councillor for the Queensland Branch of The Tax Institute.



Michael Garrone, CTA of Mage Advisory, is a trusted figure in the industry bringing over 20 years' experience across public practice and commerce. Michael has specialist knowledge in many areas of business, accounting and tax which he uses to facilitate complex projects and drive great outcomes for clients.



David Hughes, CTA, is a Partner at McCullough Robertson and a Queensland Law Society Accredited Specialist in taxation law. David acts for clients throughout Australia and offshore in relation to navigating cross-border taxation issues, including structuring advice and taxation disputes with the ATO, including audits, objections and running appeals in the High Court, Federal Court and the Administrative Appeals Tribunal against excessive tax assessments. David has also taken court action to prevent the ATO from taking illegal enforcement action, including successfully overturning departure prohibition orders.



Victoria Mercer is an Associate Lawyer in the Wealth Advisory Division at businessDEPOT (Legal), specialising in complex estate planning, self-managed superannuation, and strategic tax planning. Her practice focuses on serving high net worth individuals, business owners and blended families. Victoria distinguished herself academically by earning the title of Dux in her Advanced Superannuation during her Graduate Diploma of Applied Tax at the Tax Institute in 2023. In 2022, Victoria was nominated as a 'Rising Star' in the Queensland Wills and Estates Law category for the leading industry publication Doyle's Guide and regularly presents at industry conference including the SMSF Association, Legalwise and The Tax Institute. As a trusted advisor, Victoria relishes the opportunity to tackle complex family dynamics and structures, helping families transition their wealth to the next generation.

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.

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