Taxing Times Webinar Series – Part 8

1.5 CPD hours – Webinar

Outline

The Taxing Times Webinar Series will focus on elements of tax law with heightened relevance during this economic downturn. The topics, running from May through to September, will be released regularly to ensure relevant and timely content.

Each webinar will have a practical focus to ensure delegates are well equipped to assist their clients in navigating the ever-evolving tax landscape. The series has been developed with SME tax advisers in mind and will ensure participants can confidently identify traps and opportunities for their clients in this ever-evolving landscape.

Event Details

Date: Tuesday, 20 October 2020

Time: 12.30pm-2.00pm (AEDT)

Location: Online

CPD proficiency level:

Proficient

Register now

taxinstitute.com.au

For event queries please contact:

rose-marielinke@taxinstitute.com.au

+61 07 3225 5203

Part 8 – Current issues in managing a deceased estate

In this presentation, **Ian Raspin, CTA** and **Chanmony Om** will discuss:

- The recent exercise of the Commissioner's remedial power which allows agents to access deceased clients' data, including the ATO's Deceased estate data package,
- The recent changes to the main residence exemption which affect both estates and beneficiaries, including the operation of the new 'life event' exemption,
- The Commissioner's approach in PCG 2019/5 about extending the two-year period to dispose of dwellings acquired from a deceased estate,
- The Division 7A implications for private company loans owed by the deceased taxpayer,
- The tax merits of either selling or distributing shares of a deceased taxpayer,
- Practical issues associated with entering into a deed of family arrangement, and
- A reminder of those assets which cannot be dealt with via a will.

Presenters:

Ian Raspin, CTA, is the Managing Director of BNR Partners, who have specialised nationally in the taxation of deceased estates since 2000. He is recognised both nationally and internationally on Australian estate taxation matters, being a published author on estate taxation and a frequent presenter at both legal and accounting conferences. Ian regularly consults with professional bodies, regulators and the private sector on estate taxation issues. Ian is a Certified Tax Advisor of The Tax Institute, a fellow of CPA Australia, a member of Chartered Accountants Australia and New Zealand and a registered practitioner of the Society of Trust and Estate Practitioners. Ian is also member of CPA Australia Taxation Centre of Excellence and a director of the Society of Trust and Estate Practitioners Australia Limited.

Chanmony Om is a Tax Consultant in the Estates and Trusts team at BNR Partners. Chanmony is passionate about assisting her clients with the tax issues of a deceased estate and ensuring the estate is administered in the most tax effective manner. Chanmony has extensive experience in the main residence exemption provisions including the partial main residence exemptions, calculation of capital gains on investment properties and preparation of private ruling requests for deceased estates. Chanmony also has experience in advising small businesses in the areas of small business capital gains tax concessions, fringe benefits tax and year-end tax planning and business structuring. Chanmony has a degree in Commerce and Law, also a qualified Chartered Accountant and a member of the Taxation Institute of Australia. In her spare time, Chanmony enjoys flower arranging and landscape photography.

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Registration form

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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	Non-member
Taxing Times: Part 8	☐ Free	☐ $80

*All prices are subject to change

Choose a format that suits?

– Attend the live webinars to interact with our expert presenters; or
– Replay the webinars (post-event) at a time that suits you.

This webinar includes a PowerPoint only. A copy of the slides will be supplied electronically to delegates approximately 1-2 days prior to the webinar.

For event enquiries, please contact Rose-Marie Linke on 07 3225 5203 or rose-marielinke@taxinstitute.com.au

1.5CPD hours will be allocated for this webinar. CPD hours will be allocated to the designated attendee.

***EVENT AND MEMBERSHIP OFFER**

If you are not a member, bundle your membership with your registration. You will receive the member rate for registration and pay only $340 for membership through to June the following year.

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

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Date of signature: DD/MM/YYYY

2 Delegate contact details

If your member details are up-to-date, you can skip this section

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Online taxinstitute.com.au

Email customeradmin@taxinstitute.com.au

Mail L37, 100 Miller Street, North Sydney NSW 2060

Fax 02 8223 0077