



# TaxBanter

## 2023 offerings

[www.taxbanter.com.au](http://www.taxbanter.com.au)

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Our affiliate services are also listed on the back cover for your convenience.

# Who we are

We're Australia's leading expert in *personalised* tax training.

Our mission is to deliver expert knowledge through training sessions that are practical, comprehensive and relevant for our clients.

We're passionate about what we do, and we're proud to provide our clients with the highest quality service, materials & learning experience possible.



We're best known for our in-house training, but we also hold various online training sessions, along with nationally-presented tax workshops.

# What our clients say about us



*"Targeted, concise, relevant & very valuable"*

**Cathy, Altitude Advisory (SA)**

*"The presenters are great - very knowledgeable, understand how it is to be in practice... they do well to make the sessions engaging with, let's face it - very dry topics!"*

**Joanne , Stafford Whelan (VIC)**

*"I've been attending TaxBanter sessions for years and believe the training has helped me grow in both my career and assisting clients with their businesses."*

**Tracey, Findex (VIC)**

*"If you could ever call tax training enjoyable, it would be realising the things I didn't know or maybe have been getting wrong"*

**Richard, Bentleys (NSW)**

*"Our presenter is simply outstanding. Her knowledge, delivery style, targeting of areas of interest to us and responsiveness to our questions is of the highest standard."*

**Diane , Hassall & Hyde (VIC)**

# Our solutions: Online training options.

## Tax Updates

Tax legislation is constantly changing. Our monthly Tax Updates take all the stress out of keeping up-to-date. Accompanied with slides and a technical paper, we cover:

- ATO announcements & rulings
- Court & AAT decisions
- Proposed changes to tax law
- Emerging tax issues

You can attend on a monthly basis, or register as it suits you. Each attendee will receive a copy of the recording post-session.

## Special Topics

Our monthly Special Topic presentations are practical yet detailed analyses of specific areas of tax law or practice. We carefully select these each year based on current happenings in the industry and government. Each session is supplemented by a comprehensive technical paper and relevant case studies for maximum understanding.

The Special Topics can be purchased adhoc, or as a series. Clients who register for the entire series will receive 25% off the full price.

# Public Offer:

## 2023 Special Topics

Intended to supplement your Tax Updates at each of our training sessions, our Special Topic presentations are practical yet detailed analyses of specific areas of tax law or practice.

We carefully select these each year based on current happenings in the industry and government.

Check your specific session on our website for the 2023 schedule. These vary for our online and face-to-face sessions.

### 2023 Special Topics

**Main residence exemption**

**Deciding to object**

**CGT rollovers for restructuring an SME**

**Tax issues for professional practices**

**Using cars**

**Cryptocurrency ... in the tax net**

**Trusts - recent developments**

**Stacey goes to London**

**The sharing economy**

**Div 7A – a refresher**

**Understanding Section 100A**

**The tax professional & legal obligations**

# Our solutions:

## Monthly tax workshops.

Our public tax workshops are intended for smaller firms and sole practitioners. At these sessions, attendees receive top-tier training in a friendly, small group environment.

The sessions take place at 17 locations nationwide on a monthly basis.

- ✓ Targeted learning for smaller firms
- ✓ Ask your questions in person
- ✓ Lively group discussions
- ✓ Network with local practitioners

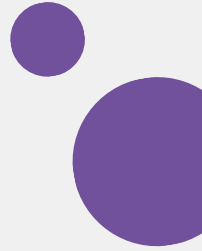


### Dates & special topics:

Visit the link below for each location's schedule.

# Our solutions: Monthly tax workshops.

[Find your session >](#)



## Queensland

1. Brisbane
2. Gold Coast

## New South Wales

1. Sydney CBD
2. Chatswood
3. Norwest
4. Newcastle

## South Australia

1. Adelaide

## Victoria

1. Melbourne CBD
2. Brighton
3. Frankston
4. Mitcham
5. Mt Waverley

## Western Australia

1. Perth
2. Bunbury
3. Busselton



# Our solutions:

## Tax Fundamentals.

Ideal for on-boarding your graduates and new hires, Tax Fundamentals is a 2 day program that reviews 9 key areas of public practice. Throughout the session, we review case studies and scenarios found in the workplace to maximise understanding.

### Key Topics:

- ✓ Deductions
- ✓ Assessable income
- ✓ Depreciation rules
- ✓ FBT
- ✓ GST
- ✓ CGT
- ✓ Business & investment structures
- ✓ GST
- ✓ CGT

**Outsource your on-boarding to us!** With our expert guidance, your new hires will be fully equipped to handle the challenges your clients throw their way, from day one.

### 2023 schedule

#### Melbourne (session 1)

1-2 March

#### Sydney (session 1)

22-23 March

#### Melbourne (session 2)

11-12 October

#### Sydney (session 2)

15-16 November

Would you like our team to present this as an in-house session at your firm? Call our BDM Mark Hua at 0413 955 686 or email him: [sales@taxbanter.com.au](mailto:sales@taxbanter.com.au)

**Prefer online training?** Find Tax Fundamentals Online on our website.

# Our solutions:

## The Next Level Workshops

Unlock the next phase of your career.

Our Next Level workshops provide a face-to-face, mentoring approach in a supportive group setting.

We'll help you identify the gaps in your learning and address them immediately in these case study-driven sessions, with practical examples you can immediately begin applying for your clients.

Session 1	Topic
<b>Melbourne (session 1)</b> 27 April, 9am-12pm	<b>Tax Consolidation Regime</b>
Session 2	Topic
<b>Melbourne</b> 6 October, 9am-12pm	<b>Small Business CGT Concessions</b>
<b>Sydney</b> 10 October, 9am-12pm	<b>Small Business CGT Concessions</b>
<b>Brisbane</b> 23 October, 9am-12pm	<b>Small Business CGT Concessions</b>

Would you like our team to present this as an in-house session at your firm? Call our BDM Mark Hua at 0413 955 686 or email him: [sales@taxbanter.com.au](mailto:sales@taxbanter.com.au)

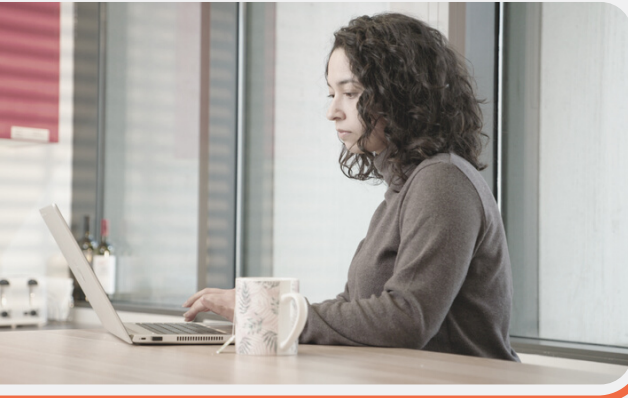
# Maintain your CPD: Further resources

## Free CPD options

**Banter Blog:** Trusted by countless accountants in the industry, we regularly release blog articles that cover newsworthy updates in an easy-to-follow format.

**Tax Yak Podcast:** We love yakking about tax! Tune in to our regular podcast, where we host a range of guests for casual chats about topical tax matters.

Available on Apple, Spotify and through our website.



## On-demand recordings

Our recording library, available on our website, covers all of our past presentations.

Browse through and choose on-demand training that suits your needs.

All recordings include a technical paper, the slides and are available for 3 months from access.

# Our training team

## Meet our team of Senior Tax Trainers.

Located throughout Australia, our Trainers facilitate all varieties of our tax training sessions. Each team member has extensive experience delivering tax courses, as well as a strong background in professional practice.

### Craig McCormick

CA, MAICD

General Manager;  
Senior Tax Trainer

### Daniel Biancardi

B.ECOM, CA

### Michael Bode

B.Ec, LL.B, CA

### Tiffany Douglas

BBus (Accounting),  
LLM (JD), MTax,  
GDLP, CA, CTA

### Tim Edgecombe

B.Com, MTax, CA, CTA

### Deb Ghuliani

B.Com, CA, CTA

### Lynne Gibson

BA (Accounting &  
Economics), FCA,  
CTA, FTIA

### George Housakos

B.ECOM, FIPA

### Brian Kamenetzky

BA, LL.B

# Our training team

## Meng Lee

BAHons (Accounting & Economics), LL.B,  
GDip (Commercial & Taxation Law)

## Phillip London

CTA M. Tax (UNSW)

## Gary Martin

B.Com, MTax,  
Dip Ed, FTIA

## Fred Schenck

MTax, BBus, CPA, CTA,  
Registered Tax Agent

## Roelof Van Der Merwe

B Com, LLB, LLM,  
CA Conversion, IPA  
Member

## Karen Vella

BEc, CA

## Tristan Webb

BEc, MA, MTax, FTI



# Diverger: More possibilities

Our extended range of accounting and wealth services through our affiliates.

## Accounting services:

- ✓ Advisers' help desk
- ✓ Accounting help desk
- ✓ CPD for financial advisors

## General services:

- ✓ Back-office outsourcing
- ✓ IT support
- ✓ CPD management system
- ✓ Client engagement tools

## Wealth services:

- ✓ Managed portfolio services
- ✓ Self-licensing
- ✓ AFSL compliance
- ✓ Licensee services
- ✓ Transitional equity

