



COOPER GRACE WARD
LAWYERS

ANNUAL ADVISER CONFERENCE PROGRAM

26-27 March
2026

Sofitel Brisbane Central
249 Turbot Street, Brisbane
or virtually via our online event platform



Welcome



I am delighted to invite you to Cooper Grace Ward's 17th Annual Adviser Conference, taking place on 26 and 27 March 2026 at Sofitel Brisbane Central and broadcast live through our event platform.

The past year has brought another wave of change and all signs point to even greater momentum in 2026. From tax and super to trusts, estates, business transactions and structuring, the landscape continues to evolve across a broad range of key areas.

Join our team of leading experts as they break down the latest developments, highlight what's on the horizon for 2026 and share practical strategies to help you and your clients navigate the shifting environment with confidence.

We look forward to seeing you there in person or online!

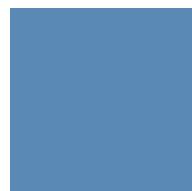


Scott Hay-Bartlem
Partner

Conference essentials

The Annual Adviser Conference is designed to give you the latest updates, practical applications and cutting-edge developments that will affect you and your clients in the coming year.

You'll hear from leading legal experts, get tips and tricks to help you and your clients, and have the opportunity to connect with peers and potential partners. Plus, you'll earn up to 12 CPD points, with sessions accredited through the SMSF Association and Financial Advice Association Australia.



Who is the conference for?

The topics, materials and case studies provided at our Adviser Conference are designed specifically to meet the needs of:

- accountants
- financial advisers
- lawyers
- other professional advisers.



What are the benefits?

Advisers who participate in the conference can expect to:

- hear from leading legal experts
- get practical tips to help you and your clients
- access networking opportunities
- gain up to 12 CPD points with sessions accredited through the SMSF Association and Financial Advice Association Australia.

Agenda

Day one

26 | March 2026
Thursday

8.00 am **Registration open**

8.30 am - 8.45 am

Introduction

Speaker: Scott HAY-BARTLEM

8.45 am - 10.30 am

WHAT'S UP WITH TRUSTS?

Speakers: Keeghan SILCOCK, Craig TURVEY and Steven CAWOOD

The world of family trusts continues to evolve and working with them is as complex as ever.

There are many hot topics when we start talking about family trusts. In these sessions, we will focus on the issues that most commonly catch advisers out.

These include:

- Gifts and loans both in and out of trusts – when is one better than the other and how do we know which is which?
- How do we keep trust assets out of a family law dispute?
- Is it time to limit beneficiary structures?
- Trust vesting rules – is 125 years real?
- FTEs – when are they needed and what are the pitfalls?
- The role of trusts in estate planning and disputes, and how to get it right!

10.30 am - 11.00 am **Morning tea**

11.00 am - 12.30 pm

WHAT'S UP WITH TRUSTS? CONTINUED

Speakers: Linda TAPIOLAS and Melinda RANSON

12.30 pm - 1.15 pm **Lunch**

1.15 pm - 2.30 pm

SMSF UPDATE

Speakers: Scott HAY-BARTLEM and Clinton JACKSON

We never really expected 2025 to be a quiet year in SMSF world, and it did not disappoint!

From the obvious impact of the refreshed Div 296 rules to ongoing discussions around death benefit dependence and NALI, there is as much to talk about as ever.

2.30 pm - 3.00 pm **Afternoon tea**

3.00 pm - 4.00 pm

SMSF DEATH BENEFITS GONE WRONG

Speakers: Scott HAY-BARTLEM, Clinton JACKSON and Sarah CAMM

SMSFs and death benefits represent a very interesting intersection of different laws.

Now more than ever, SMSF death benefit planning is being blow torched and it is very common to see this leading to disputes.

In this session, we will discuss what we are seeing on files, the lessons we can take from those experiences and how to avoid becoming one of the case studies at next year's conference!

4.00 pm - 5.00 pm **Networking and drinks**

Agenda

Day two

27 | March 2026
Friday

8.00 am Registration open

8.30 am - 8.45 am

Introduction

Speaker: Scott HAY-BARTLEM

8.45 am - 9.30 am

THE EXPANDING REACH OF PAYROLL TAX – ARE YOUR PASSIVE ASSETS AND SUPERANNUATION UP FOR GRABS?

Speaker: Tom WALRUT

The state revenue offices are as active as ever, and payroll tax is a major source of investigation at the moment.

Payroll tax is full of surprises and we find that, even where it has been considered, a quirk in the rules can mean very unexpected results.

In this session, we will discuss where we are seeing businesses getting caught, including:

- grouping trusts
- recovery action against other trusts and your SMSF
- contractor payments
- common commercial arrangements that are in fact 'employment agents'.

Think you have it under control? So did many of our clients with large unexpected payroll tax bills.

9.30 am - 10.15 am

WHEN THE ATO COMES AND REALLY DOESN'T WANT TO HELP ...

Speakers: Joanne CASBURN and Ben WILLIAMS

We are seeing increasing activity from the ATO, with more aggressive recovery action becoming commonplace.

How and when we respond to the ATO's enquiries can have a significant impact on the outcome.

In this session, CGW's Joanne Casburn will draw on her experience from both sides of the fence to guide us through the labyrinth of dealing with the ATO, with Ben Williams from our litigation and dispute resolution team.

10.15 am - 10.45 am

WHAT ADVISERS NEED TO KNOW ABOUT AML (YES, IT'S HERE FOR ALL OF US!)

Speaker: Phil VICKERY

The AML obligations are hitting many advisers from 1 July 2026, with many encountering them for the first time.

These new rules impose significant obligations.

So, as advisers, what do we need to know and how do we deal with this challenge?

10.45 am - 11.15 am Morning tea

Agenda

Day two

27 | March 2026
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11.15 am - 12.00 pm

PREPARING A BUSINESS FOR SALE – TIPS AND TRAPS

Speakers: Clinton JACKSON and Alfred JACKSON

The business transaction market is hot at the moment, with many businesses changing hands.

There is definitely an art to a successful business sale.

Join CGW team members as they talk about the important things to do when prepping a business for sale and, more importantly, what not to do ...

12.00 pm - 1.00 pm

EMPLOYMENT RELATIONSHIPS IN FAMILY LAW MATTERS

Speakers: Justine WOODS and Gemma SHARP

Business relationships complicate family law matters, and when spouses and other family members are employed in a business it gets more interesting again!

In this session, you will hear from both family and employment lawyers, exploring how the Family Court considers businesses in family law disputes, how employment law applies, and how to protect yourself when employment law claims and family law disputes overlap.

1.00 pm - 1.45 pm **Lunch**

1.45 pm - 2.45 pm

INCAPACITY

Speakers: Rebecca EDWARDS and Sarah CAMM

As the population ages, incapacity is becoming an increasingly significant issue.

How can advisers help their clients deal with incapacity? What should advisers look out for, and what should they do when they are concerned about a client's capacity?

This session will feature insights from the CGW team to help advisers navigate this difficult area.

2.45 pm - 3.15 pm **Afternoon tea**

3.15 pm - 5.00 pm

PANEL DISCUSSION: DRIVERS IN CHOOSING A BUSINESS STRUCTURE

Speakers: Linda TAPIOLAS, Laura GAHAN, Miranda KLIBBE, Annie SMEATON, Charles SWEENEY and Tom WALRUT

Choosing the right structure for business activities has always been challenging, and each year there seems to be more to consider.

There are always the obvious factors like tax effectiveness, but in 2026, there are also some surprises in other areas.

Join our panel, drawn from the different areas of CGW's practice, as they explore the many different drivers in identifying the optimal structure.

5.00 pm - 6.00 pm **Networking and drinks**

Our speakers



Laura GAHAN

Partner



Scott HAY-BARTLEM

Partner



Clinton JACKSON

Partner



Miranda KLIBBE

Partner



Annie SMEATON

Partner



Charles SWEENEY

Partner



Linda TAPIOLAS

Partner



Phil VICKERY

Partner



Justine WOODS

Partner



Joanne CASBURN

Special Counsel



Rebecca EDWARDS

Special Counsel



Melinda RANSON

Special Counsel



Gemma SHARP

Special Counsel



Craig TURVEY

Special Counsel



Tom WALRUT

Special Counsel



Ben WILLIAMS

Special Counsel



Keeghan SILCOCK

Senior Associate



Sarah CAMM

Associate



Alfred JACKSON

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Steven CAWOOD

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