COOPER GRACE WARD
LAWYERS



ANNUAL ADVISER CONFERENCE
PROGRAM

18-19 March 2027

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 18th Annual Adviser Conference, taking place on 18 and 19 March 2027 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 2027. 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 2027 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 the 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?

As an adviser who participates in the conference, you will 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

18 | March 2027
Thursday

8.00 am Registration opens

8.30 am - 8.45 am

INTRODUCTION AND CASE STUDY OVERVIEW

Speaker: Scott HAY-BARTLEM

8.45 am - 10.30 am

OVERVIEW OF 2026 FEDERAL BUDGET CHANGES!

Speaker: Linda TAPIOLAS

The 2026 federal Budget introduced significant changes to fundamental parts of the Australian taxation system, particularly for CGT, negative gearing and family trusts.

Since then, there have been many more announcements (including some important carve-outs), and several measures have progressed into legislation.

This session will provide an overview of these key changes and an update on their progress.

10.30 am - 11.00 am Morning tea

11.00 am - 12.30 pm

OVERVIEW OF 2026 FEDERAL BUDGET CHANGES!

Speaker: Linda TAPIOLAS

(Continued)

12.30 pm - 1.15 pm Lunch

1.15 pm - 2.30 pm

SMSF UPDATE

Speakers: Scott HAY-BARTLEM and Clinton JACKSON

With 1 July 2026 as the start date for Division 296 tax, 2026 was never going to be boring for SMSFs and their advisers. And it did not disappoint!

There were numerous further developments, including some interesting cases and rulings, with the surprise high point being the changes to the SMSF borrowing (LRBA) rules.

2.30 pm - 3.00 pm Afternoon tea

3.00 pm - 4.00 pm

'BUSINESS REAL PROPERTY'

Speakers: Scott HAY-BARTLEM, Clinton JACKSON and Keeghan SILCOCK

'Business real property' has been in the superannuation rules for many years now, and is deceptively complex.

Although it does not take up many lines in the law, rulings and practical reality combine to make it a tricky area to advise on.

With the changes to the SMSF borrowing (LRBA) rules taking effect from August 2026, the spotlight is back on this concept.

In this session, we will discuss what is and is not 'business real property', where the ATO's view provides some surprises, and the traps we see when advising on this surprisingly complex term.

4.00 pm - 5.00 pm Networking and drinks

Agenda

Day two

19 | March 2027
Friday

8.00 am Registration opens

8.30 am - 8.45 am

INTRODUCTION AND CASE STUDY OVERVIEW

Speaker: Scott HAY-BARTLEM

8.45 am - 9.45 am

ARE THERE STILL OTHER REASONS FOR FAMILY AND TESTAMENTARY TRUSTS?

Speakers: Melinda RANSON, Craig TURVEY and Andrew VELLA

The 2026 federal Budget may have significantly eroded the tax benefits of family discretionary and testamentary trusts.

However, tax is not the only driver for using these structures, and they can play an important role in other situations.

This session will consider the other reasons for using family discretionary and testamentary trusts, beyond the world of tax.

9.45 am - 10.15 am

THE IMPACT OF DIVISION 296 TAX ON ESTATE PLANNING AND ADMINISTRATION

Speaker: Rebecca EDWARDS

2026 has seen many important changes, but one that will have quite a significant impact on both planning for and administering estates is Division 296.

So what does Division 296 mean for members of superannuation funds and their advisers when planning for estates, and then after death?

10.15 am - 10.45 am Morning tea

10.45 am - 11.30 am

INSIDE THE ATO: HOW THE COMMISSIONER MAKES DECISIONS AND HOW ADVISERS CAN CHALLENGE THEM

Speaker: Joanne CASBURN

What happens when the ATO gets it wrong? Understanding how decisions are made within the ATO, and knowing when and how to challenge them, can fundamentally change the course of an audit or dispute.

Drawing on experience from both inside the ATO and now representing taxpayers, this session goes behind the formal processes to examine what really matters in an ATO dispute. It will explore how to identify weaknesses in the Commissioner's position, build the evidence early, challenge assumptions that have become accepted as fact, and use escalation, objections, settlement and litigation strategically.

The session focuses on knowing when to cooperate, when to escalate and when to push back, while giving advisers practical strategies they can use the next time the ATO comes knocking.

Agenda

Day two

19 | March 2027
Friday

11.30 am - 12.15 pm

THE ADVISER'S ROLE IN ESTATE DISPUTES

Speakers: Sarah CAMM and Katelyn GILLERT

Advisers are often on the front line in assisting clients with decisions, implementing transactions and signing documents.

This means they are in a unique position when there are disputes about what has happened, especially once the client has died or if there are issues with the client's capacity.

Drawing on our own file experience, this session will discuss what advisers should do when helping clients with decisions and transactions, and how they can smooth the administration process.

12.15 pm - 1.00 pm Lunch

1.00 pm - 1.30 pm

INTER-ENTITY TRANSACTIONS

Speaker: Alfred JACKSON

Following recent cases, there is a growing emphasis on the commerciality of inter-entity transactions, and part of that is documentation.

So when should we document inter-entity transactions, and what should the documents look like?

1.30 pm - 2.30 pm

DUTY ROLLOVERS FOR RESTRUCTURES

Speakers: Clinton JACKSON, Tom WALRUT and Steven CAWOOD

With the 2026 federal Budget changes, restructures are definitely on the cards.

While the federal government is talking tax rollovers, what about the duty position?

This session will consider what duty rollovers may be available, the conditions attached to them, and what may work as we change structures over the next few years.

2.30 pm - 3.00 pm Afternoon tea

3.00 pm - 5.00 pm

PANEL DISCUSSION: DRIVERS IN CHOOSING A BUSINESS STRUCTURE FOR THE MODERN ENVIRONMENT

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

The 2026 federal Budget has a significant impact on how we hold assets, whether for investment or as active business assets.

Building on Thursday's discussion of the changes and announcements, this session looks at what they mean for asset holding structures in 2027 and beyond.

Linda Tapiolas will discuss what the 2026 federal Budget means for structuring, and, with a panel drawn from across Cooper Grace Ward, work through the many drivers and surprising flow-on effects.

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



Justine WOODS

Partner



Joanne CASBURN

Special Counsel



Rebecca EDWARDS

Special Counsel



Melinda RANSON

Special Counsel



Craig TURVEY

Special Counsel



Andrew VELLA

Special Counsel



Tom WALRUT

Special Counsel



Sarah CAMM

Senior Associate



Katelyn GILLERT

Senior Associate



Alfred JACKSON

Senior Associate



Keeghan SILCOCK

Senior Associate



Steven CAWOOD

Associate

COOPER GRACE WARD
LAWYERS

ANNUAL ADVISER CONFERENCE

18-19 March 2027

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

REGISTER NOW