

## Taxation of Trusts

- Facilitator:** Jonathan Ilbery of Jackson McDonald (Partner)
- Location:** Jackson McDonald, Level 25, 140 St Georges Tce, Perth
- Date:** Thursday 12 May 2011
- Time:** 5:30pm – 7:30pm
- Cost:** \$20 (members) and \$60 (non-members)
- Format:** Roundtable Discussion - limited places
- Topic:**



In keeping with STEP WA's desire to deliver quality educational events not otherwise available in Perth, STEP is holding a high level roundtable discussion for STEP members and potential STEP members. This informal (high level) discussion will attract experienced practitioners keen to exchange views on the past, present and future methods of the taxation of trusts. The roundtable will specifically examine the following:

**'Where were we'** - Review of taxation of trust income under Division 6 of the Income tax Assessment Act 1936 pre the High Court decision in the Bamford case and techniques employed to overcome problems with its application.

**'Where are we now'** - What did the Bamford decision resolve and what did it not resolve.

**'Where are we going'** – What are suggested interim and longer term legislative solutions and their likely outcomes.

### About the facilitator:

Jonathan is an Honorary Life Member and a past National President of the Taxation Institute of Australia. He has wide experience in providing clients with high-level commercial advice and more particularly into the areas of Federal and State taxation, trusts, partnerships, corporations, estate and capital gains tax planning, and corporate wills and trade practices.

He is experienced in advising clients in the tax structuring of their business and individual affairs to minimise tax imposts and in negotiations with the Australian Tax office. He has advised banks in relation to taxation matters and State instrumentalities on taxation issues in offshore financing.

*CPD: Please note STEP Perth will apply to the Legal Practice Board to have this event recognised as a CPD event. If approved it will attract 1 point in competency area 1 (Legal Skills and Practice). We will advise attendees of the outcome of the application in due course.*

Please join us for an Educational Event of  
**STEP**  
The Society of Trust and  
Estate Practitioners  
Perth

www.step.org

**STEP**  
Society of Trust and  
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Perth

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Perth  
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**Cost:** \$20 for members and \$60 for non members  
**RSVP:** Tuesday 10 May 2011

*Drinks and canapes will be provided*

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Yes I will attend

Please add me to your mailing list

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

Please find enclosed a cheque (made payable to Jackson McDonald)

\$60.00 for Non-members

\$20.00 for Members

EFT Direct Payment

EFT Payment to be made to Jackson McDonald Trust Account

**BSB** 086-006  
**Account No** 01-641-5294

**Please use reference STEP**

**Please post your  
registration to:**

**Josh Maldenis, Jackson McDonald  
GPO Box M971  
Perth WA 6843**

**or email to [jmaldenis@jacmac.com.au](mailto:jmaldenis@jacmac.com.au)**

*Upon payment this form will become a tax invoice.*

For further information about STEP Perth and STEP International please contact:

Sarah Walton of Jackson McDonald

Email: [swalton@jacmac.com.au](mailto:swalton@jacmac.com.au) Tel: (08) 9426 6750