



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



Agenda

Day one

26 | March 2026
Thursday

WHAT'S UP WITH TRUSTS?

Speakers: Keeghan SILCOCK, Craig TURVEY, Steven CAWOOD, Linda TAPIOLAS and Melinda

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?
- The role of trusts in estate planning and disputes, and how to get it right!

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.

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!

SMSF DEATH BENEFITS GONE WRONG

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

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Day two

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Friday

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.

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.

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?

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 ...

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EMPLOYMENT RELATIONSHIPS IN FAMILY LAW MATTERS

Speakers: Justine WOODS and Annie SMEATON

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.

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.

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.

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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