



INSTITUTE OF
FINANCIAL
PROFESSIONALS
AUSTRALIA

Tax | Super | Financial Services

Institute of Financial
Professionals Australia
2026 Annual Conference & Expo

STRONGER PRACTICES, BRIGHTER FUTURES

19–20 March 2026

CONFERENCE AGENDA

Melbourne, Online and On Demand

CONFERENCE AGENDA

DAY ONE 19 MARCH 2026

8:30 – 8:45 AM	REGISTRATIONS OPENS	
8:45 – 9:00 AM	MC INTRO AND PRESIDENT'S WELCOME	
SESSION ONE 9:00 AM	LEGISLATION & REGULATIONS UPDATE Joshua Goldsmith and Natasha Panagis	
10:15 - 10:40 AM	MORNING TEA	
SESSION TWO 10:40 AM	TAXATION STREAM ATO FOCUS AREAS FOR SMES AND INDIVIDUALS Joshua Goldsmith	SUPER/FINANCIAL SERVICES STREAM OPTIMISING SUPER CONTRIBUTIONS: Strategies to Maximise Client Outcomes Michelle Griffiths
SESSION THREE 11:40 AM	TAXATION STREAM PCG 2025/5: Part IVA, PSI and Profit Retention Under Scrutiny Declan Cawley and Mark West	SUPER/FINANCIAL SERVICES STREAM FROM PREMIUMS TO PAYOUTS: Insurance in Super Explained Stuart Sheary
12:40 - 1:40 PM	LUNCH	
SESSION FOUR 1:40 PM	TAXATION STREAM WORKSHOP: Small Business CGT Concessions, Practical Applications and Common Pitfalls Linda Tapiolas	SUPER/FINANCIAL SERVICES STREAM WORKSHOP: Ethics in Practice - Navigating Real-World Client Challenges Nidal Danoun
3:40 - 4:00 PM	AFTERNOON TEA	
SESSION FIVE 4:00 PM	AWARD-WINNING ADVICE: What Top Practices Do Differently	
SESSION SIX 4:35 PM	UNSTOPPABLE VELOCITY Keith Abraham	
5:35 PM	NETWORKING DRINKS	
6:30 PM	DINNER	

CONFERENCE AGENDA

DAY TWO 20 MARCH 2026

SESSION ONE
9:00 AM

DAY 1 RECAP
Keith Abraham

SESSION TWO
9:15 AM

SMSF DEATH BENEFIT PLANNING: Avoiding Disputes and Protecting Client Outcomes
Dan Butler

SESSION THREE
10:15 AM

YOU'RE A TARGET: Cyber Security for Tax, Super and Advice Practices
Ruthland Smith

10:45 - 11:10 AM

MORNING TEA

SESSION FOUR
11:10 AM

TAXATION STREAM

CLOSING THE ADVICE GAP:
Practical Advice Delivery for
Accounting Firms
George Haramis

SUPER/FINANCIAL SERVICES STREAM

LIVS EXPLAINED:
Structure, Stability and Portfolio Fit
Listed Association

SESSION FIVE
11:40 AM

TAXATION STREAM

CGT AND DECEASED ESTATES:
Avoiding Traps in Death and Estate
Planning
Karen Goodfellow

SUPER/FINANCIAL SERVICES STREAM

ALL THINGS PENSIONS
Natasha Panagis and Stuart Sheary

12:40 - 1:40 PM

LUNCH

SESSION SIX
1:40 PM

TAXATION STREAM

PROPERTY AND TAX PLANNING:
What Tax Advisers Need to Know
Mark Chapman

SUPER/FINANCIAL SERVICES STREAM

**THE ROLE OF AN ADVISER TO
SUPPORT THEIR CLIENTS THROUGH
ESTATE PLANNING AND LOSS OF
CAPACITY**
Anna Hacker

2:40 - 3:00 PM

AFTERNOON TEA

SESSION SEVEN
3:00 PM

DIVISION 296: What to Expect and What It Means for Clients
Phil Broderick

4:00 PM

FINAL WRAP-UP AND PRIZE DRAWS

4:30 PM

NETWORKING DRINKS



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