

Private Client Advisors Summit 2026

Navigating change in Australia's
accounting, legal and tax landscape.

Thursday, 17 September 2026

8:30 AM - 7:00 PM

Rydges Melbourne
186 Exhibition Street, Melbourne

velocitylegal.com.au



A Message from our Managing Director



Welcome to Velocity Legal's 2026 Private Client Advisors Summit.

We are pleased to bring together advisors and senior professionals for a full-day program focused on the issues shaping Australia's accounting, legal and tax landscape.

Advisors to private clients are operating in an increasingly complex environment. The Summit will explore the legal, tax and commercial issues driving that complexity, including legislative reform, regulatory scrutiny, evolving employment obligations, succession planning, insolvency risk, SME transactions, governance expectations and financial crime risk.

The Summit has been designed to provide practical, relevant insights for professionals working with private businesses, family groups and high-net-worth individuals. Throughout the day, our sessions will explore key developments, common client issues and practical strategies that advisors can apply in their day-to-day work.

You will hear from Velocity Legal lawyers and leading industry speakers, strengthen your professional network, and leave with ideas that will help you support clients with confidence in a changing environment.

Explore the program and register now to secure your place.



Andrew Henshaw

Managing Director, Velocity Legal

Post-Summit Networking Reception

Join attendees, presenters, and the Velocity Legal team after the 2026 Private Client Advisors Summit for drinks, canapés, and conversation at Longsong.

Time 5:00–7:00pm

Venue Longsong, 44 Little Bourke St



Summit Program



The 2026 Private Client Advisors Summit includes nine sessions presented by Velocity Legal lawyers and industry experts.

Time	Session Description	Location
8:30–8:45	Arrival & Registration	Pre-function Space
8:45–9:00	Welcoming Address Presented by: Andrew Henshaw (Managing Director, Velocity Legal)	Meeting Place 1–3
9:00–10:00	Session 1 Untangling the Tax Web: Reform, Risk, and Restructuring in a Shifting Landscape In a period of accelerating regulatory change, increasingly complex transactions and growing pressure on Australia's tax system, this panel discussion will provide practical insights from tax experts and explore what lies ahead for practitioners, businesses and policymakers. Moderator: Andrew Henshaw (Managing Director, Velocity Legal) Panellists: Tony Greco (Senior Tax Advisor, IPA), John Storey (Tax Counsel, The Tax Institute), and Rajan Verma (Director, Velocity Legal)	Meeting Place 1–3
10:00–10:10	Networking Break	Pre-function Space
10:10–11:10	Session 2A Recent Employment Law Changes: Are You and Your Clients Ready? Over the past 18 months, the employment law landscape in Victoria and across Australia has undergone one of the most significant overhauls in a decade. This session will unpack the key changes every advisor, accountant and legal professional needs to understand to help keep clients compliant, protected and prepared. During this session, we will look at: • Mental health in the workplace • Set-off clauses and underpayments • Recent developments and what lies ahead Presented by: Jess Hill (Director, Velocity Legal) and Katherine Stewart (Senior Associate, Velocity Legal)	Meeting Place 1–3
	Session 2B Duty Exemptions: Where They Go Wrong and How to Fix Them Duty exemptions may be available in certain circumstances for transfers of property from trusts and self-managed superannuation funds (SMSFs). However, the requirements are strict. This session will provide a practical overview of complex applications for duty exemptions on property transfers. It will focus on key compliance requirements, common issues and pitfalls that may affect the availability of these exemptions, and how to improve the prospects of a successful application. Attendees will leave with a clearer, more structured approach to preparing duty exemption applications, and positioning clients for better outcomes. Presented by: Bryan Yeo (Special Counsel, Velocity Legal) and Joel Garrett (Special Counsel, Velocity Legal)	Meeting Place 4

Time	Session Description	Location
11:10–11:30	Networking Morning Tea	Pre-function Space
11:30–12:30	Session 3 Keeping it in the Family: Navigating Succession in Family Businesses Transitioning a family business to the next generation is often one of the most critical and complex moments in the lifecycle of an SME. It often requires balancing commercial outcomes, tax efficiency and preserving family relationships. This panel discussion will explore the real-world challenges of succession, including how ownership structures affect transition options and the importance of tailored legal mechanisms in supporting a smooth handover. Our panel will also discuss tax and duty consequences, family law issues, estate planning considerations, and governance tools such as shareholder agreements and family constitutions to support long-term success. Moderator: Andrew Henshaw (Managing Director, Velocity Legal) Panellists: Jess Hill (Director, Velocity Legal) and Jennifer Maher (Director, Velocity Legal).	Meeting Place 1–3
12:30–1:20	Networking Lunch	Pre-function Space
1:20–2:20	Session 4A Family Law and Intergenerational Wealth in Australia This session will explore how Australian family law interacts with wealth structures, trusts and inheritances, and what advisors should consider when advising families on the transfer of wealth across generations. It will examine the family law issues that can arise in succession and intergenerational wealth planning, including how trusts, inheritances and family wealth structures may be treated in the event of a relationship breakdown. Presented by: Victoria Kilby (Director, Velocity Legal)	Meeting Place 1–3
	Session 4B Saving a Distressed Business: Practical Insolvency and Asset Protection Strategies Financial pressure does not always mean the end of a business. With timely advice, business owners may have options to protect key assets, manage creditor pressure and create a path forward. This session will provide clear, practical insights into the options available when a business faces insolvency risk, including: • Formal restructuring pathways • Creditor negotiations • Key issues affecting restructuring and recovery Presented by: Demian Walton (Director, Velocity Legal) and Seamus Ryan (Director, Velocity Legal)	Meeting Place 4
2:20–2:30	Networking Break	Pre-function Space

Time	Session Description	Location
2:30–3:30	Session 5A Rights of Estate and Trust Beneficiaries: What Do They Mean in Practice? Beneficiaries of estates and trusts often have rights that are not well understood, including rights to information, rights to challenge decisions and rights to object to certain steps. This session will give advisors a practical overview of those rights, the disclosure obligations that may arise, and the claims or challenges beneficiaries may bring. This session will cover: • The rights of beneficiaries under estates and trusts • Disclosure obligations and access to information • Circumstances in which a beneficiary may object • Claims and challenges beneficiaries may bring Presented by: Jennifer Maher (Director, Velocity Legal) and Isobel Feben (Special Counsel, Velocity Legal)	Meeting Place 1–3
	Session 5B SME M&A Demystified: What Accountants Need to Know Before a Deal Accountants play a central role in SME mergers and acquisitions. They help clients understand the financial position of a business, identify risks early and bring structure to decisions that often carry both commercial and personal weight. This session will demystify the SME M&A process for accountants and focus on the issues that matter most, including: • The transaction lifecycle • Due diligence • Structuring the sale, including whether to proceed by business sale or share sale, and what the letter of offer should cover • Key contract requirements • Purchase price structures, including earn-outs and deferred payments • Practical steps after completion Presented by: Jess Hill (Director, Velocity Legal) and Robert Osler (Director, Velocity Legal)	Meeting Place 4
3:30–3:45	Networking Afternoon Tea	Pre-function Space
3:45–4:45	Session 6 When AML Controls Fail: Lessons from Australia’s Biggest Financial Crime Scandals Keynote speaker Nick McKenzie will examine some of Australia’s most significant financial crime and corruption scandals and explore what happens when oversight, accountability and anti-money laundering (AML) controls fail, and the consequences that follow for regulators, businesses, advisors and the wider public. Drawing on major investigations, including Crown Resorts and The Star, corruption across politics and sport, and most recently, the CFMEU, Nick will unpack how governance gaps, weak controls and systemic blind spots create opportunities for misconduct and criminal networks to operate. He will also show how these risks can arise in ordinary transactions, client relationships, institutions and business systems when accountability and controls fall short. Presented by: Nick McKenzie (Investigative Journalist, The Age, and The Sydney Morning Herald)	Meeting Place 1–3
4:45–5:00	Concluding Remarks Presented by: Andrew Henshaw (Managing Director, Velocity Legal)	Meeting Place 1–3

Helpful Summit Information



Below are the key details for the 2026 Private Client Advisors Summit.

Getting There

Rydges Melbourne **186 Exhibition Street, Melbourne VIC 3000**

Rydges Melbourne is located in the heart of Melbourne's theatre district, with Chinatown, Collins Street, Melbourne Central, Emporium, and Bourke Street Mall nearby.

Public Transport Rydges Melbourne is about a five-minute walk from Parliament Station.

Parking On-site parking is available at Rydges for \$60 per day. Please note that parking is subject to availability and venue rates should be confirmed closer to the event.

Secure Parking is also available at 59 Lonsdale Street, and is open 24 hours a day, seven days a week.

Dietary & Accessibility Requirements

If you have dietary or accessibility requirements that you have not already told us about, please contact a Velocity Legal team member as soon as possible.

Enquiries

For more information about the [2026 Private Client Advisors Summit](#) or Velocity Legal, please contact us by phone on **(03) 7043 3311** or by email at office@velocitylegal.com.au.



Speaker Profiles



We are pleased to welcome our speakers, who will share practical insights throughout the 2026 Private Client Advisors Summit.



Andrew Henshaw
Managing Director,
Velocity Legal

Andrew is a trusted advisor to accountants and private clients. He has built a reputation for creative problem-solving and for delivering solutions others may overlook. His genuine passion for tackling complex tax issues and his cutting-edge approach have resulted not only in exceptional outcomes for his clients but also in wide recognition within the industry.

Andrew's work spans complex tax disputes, business restructures, succession planning and major transactions.

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andrew.henshaw@velocitylegal.com.au



Demian Walton
Director, Velocity
Legal

Demian has more than 20 years' experience as a commercial litigator and insolvency lawyer, guiding clients through matters that often involve significant financial or operational pressure. He brings a practical, strategic approach to helping clients identify the key issues, protect their position and make informed decisions in complex or distressed situations.

Demian's work spans high-value commercial disputes, asset structuring, and advising on the acquisition or restructuring of distressed businesses.

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demian.walton@velocitylegal.com.au



Jess Hill
Director, Velocity
Legal

A trusted advisor to businesses and their directors, Jess advises on complex transactions, disputes and employment matters. Working across the firm's Commercial, Disputes and Employment practices, she helps clients navigate the intersection of business strategy, legal risk and regulatory compliance. She brings a practical, commercially focused approach to helping clients manage risk, make informed decisions and resolve complex issues.

Her practice spans front-end advisory work, employment and commercial matters, and complex litigation.

0418 338 292

jessica.hill@velocitylegal.com.au



Jennifer Maher
Director, Velocity
Legal

Jennifer is a leading trusts and estates lawyer in Victoria. She has been involved in landmark cases and has a track record of achieving successful outcomes, with an unwavering focus on her clients' objectives.

The Law Institute of Victoria has recognised Jennifer as a Wills and Estates accredited specialist. This accreditation recognises lawyers who have demonstrated substantial experience, knowledge and expertise in a particular area of law through a rigorous assessment process.

0402 336 173

jennifer.maher@velocitylegal.com.au



Rajan Verma
Director, Velocity
Legal

Known for bringing tax-efficient outcomes to large-scale transactions, Rajan combines deep technical knowledge with a strong understanding of accounting and finance, allowing him to work closely with accountants and financial advisors on complex commercial issues.

Rajan's practice includes business restructures, tax-effective business sales and exits, advising on high-value property developments, international taxation and resolving complex tax disputes with the ATO and state revenue offices.

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Seamus Ryan
Director, Velocity
Legal

Seamus provides technical and strategic advice to clients, frequently acting in high-value matters in the Supreme Court and County Court of Victoria, the Federal Court of Australia and the Administrative Review Tribunal. His practice focuses on complex commercial disputes, insolvency-related matters and proceedings that require both technical analysis and practical commercial judgment.

Seamus works closely with clients to identify key issues early, assess available options and set a clear path forward. He guides clients through each stage of a dispute with structured, practical advice.

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seamus.ryan@velocitylegal.com.au

Speaker Profiles Continued



Robert Osler
Director, Velocity
Legal

Robert is an experienced commercial lawyer who works closely with clients to help them complete transactions efficiently and with confidence. He is recognised for his straightforward approach and ability to cut through complexity, providing clear recommendations that support commercial outcomes without slowing down the transaction process.

By taking the time to understand each client's business, Robert ensures his advice is practical, relevant and aligned with the client's operational and strategic needs.

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Victoria Kilby
Director, Velocity
Legal

Victoria is an Accredited Specialist in Family Law with more than a decade of exclusive family law experience, advising on property settlements, parenting matters, Binding Financial Agreements and spousal maintenance.

Her commercial litigation and corporate advisory background gives her particular strength in complex financial matters involving businesses, trusts, companies and significant asset holdings. Victoria's advice is clear and strategic, helping clients move forward with confidence.

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victoria.kilby@velocitylegal.com.au



Isobel Feben
Special Counsel,
Velocity Legal

Isobel brings empathy, insight and technical precision to her work in trusts and estates. Many of her clients come to her during times of transition, whether they are planning for the future, navigating family change or managing loss.

She finds purpose in helping clients make decisions that bring security and peace of mind. She values the trust they place in her to guide them through deeply personal matters. Her approach combines careful legal analysis with a practical understanding of each client's circumstances.

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Bryan Yeo
Special Counsel,
Velocity Legal

Bryan advises private businesses, property developers and high-net-worth individuals and families on complex property, leasing and commercial transactions.

His practice spans property transactions, commercial leasing, business sales, mergers and acquisitions and a range of state tax matters, including duty exemption applications. Bryan brings a practical, commercially focused approach to helping clients structure transactions, manage risk and navigate complex property and duty issues.

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Joel Garrett
Special Counsel,
Velocity Legal

Joel advises on complex property matters with a strong commercial focus. He is known for technical precision, practical commercial judgment and a proactive approach to progressing matters efficiently within agreed timeframes.

His expertise spans retail, commercial and telecommunications leasing; acquisitions and sales of commercial and development land; and property-related state tax issues.

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Katherine Stewart
Senior Associate,
Velocity Legal

Katherine has deep experience in employment law and regularly assists clients with complex workplace issues. She helps clients navigate the changing employment law landscape with practical advice, clear guidance and a focus on managing risk.

Her experience spans the full spectrum of workplace relations. She brings lateral thinking and practical judgment to employment matters, helping clients understand their obligations and navigate issues with clarity.

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Speaker Profiles Continued



Tony Greco
Senior Tax Advisor,
The Institute of Public
Accountants (IPA)

Tony Greco joined the Institute of Public Accountants (IPA) as Senior Tax Advisor in 2009 and represents the IPA on several peak body forums with Treasury, the ATO and the Tax Practitioners Board.

He has participated in numerous parliamentary inquiries into tax administration and has assisted the Board of Taxation as a member of one of its expert working committees.

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Nick McKenzie
Investigative Journalist,
The Age, The Sydney
Morning Herald

Nick McKenzie is an acclaimed Australian investigative journalist who works for The Age and The Sydney Morning Herald. He has presented major investigations for the ABC's Four Corners, 60 Minutes and the Australian Financial Review.

With more than 20 years' experience, Nick has won every major award in Australian journalism, including 20 Walkley Awards, and the Gold Walkley. He has been named Australian Journalist of the Year on five occasions and is best known for major investigations, including his exposés of Crown Resorts and The Star, corruption on both sides of politics and in sport, and most recently, the CFMEU.

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John Storey
Tax Counsel,
The Tax Institute

John is an experienced tax lawyer, business leader, public policy advocate, author and The Tax Institute's Tax Counsel. He has practised as a tax lawyer for two decades, becoming a partner in a national law firm and managing director of his own boutique practice.

He has also been a tax trainer, podcast host, regular TV and radio commentator, and is a sought-after public speaker.

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