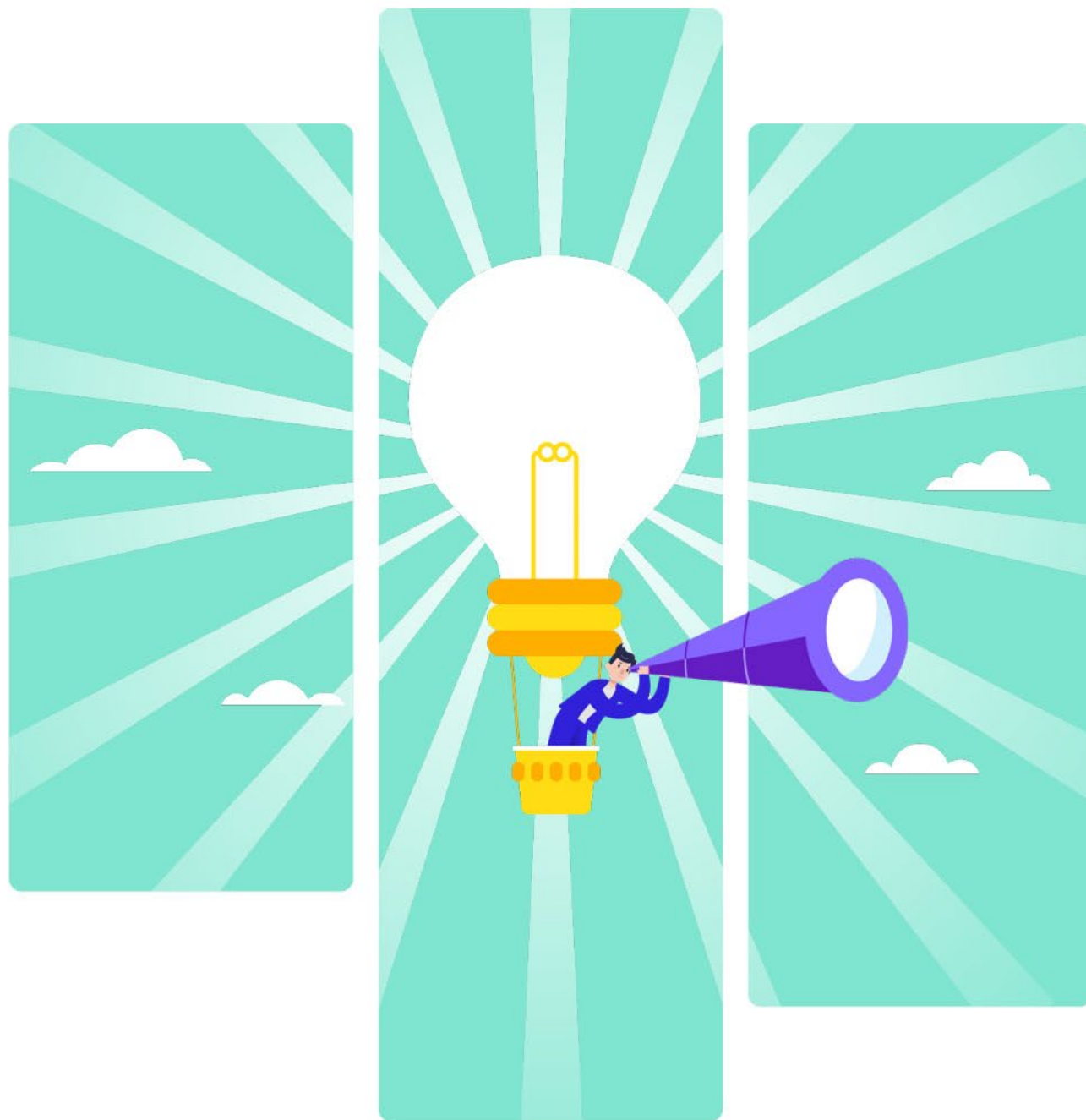


# Yarra Valley Tax Retreat

**21-22 July 2022**

**RACV Healesville  
Country Club & Resort**

**12 CPD hours**



# Welcome

On behalf of our Retreat Organising Committee, I'm delighted to welcome you to join us in the picturesque Yarra Valley for two days of taxation and relaxation.

The stunning backdrop of the RACV Healesville Country Club & Resort provides the perfect setting for the face-to-face networking opportunities we've all been missing. Our packed program combines valuable technical sessions, practical insights and thought leadership, led by industry-leading experts, with interactive workshops that delve into the details through practical analysis and application.

The excellent technical program considers how tax and superannuation laws apply to families and their businesses. It covers a range of topics in this complex area, including trust distributions and trust splitting, marriage and relationship breakdowns, changes in stakeholders, working with blended families, estate planning, capital gains tax, section 100A, Division 7A, superannuation and more.

We all need to think ahead to prepare our clients and their businesses (and families) for their next phase. Our program addresses the three main phases of the lifecycle of a family business; set up and growth, death and divorce / relationship breakdown, and succession and retirement. Each phase includes three technical sessions followed by a structured but relaxed workshop to flesh out the technical and practical issues that arise for our clients. The workshops build on one evolving case study, with each successive workshop focussing on the next phase of the business – just like in real life.

We recognise that taking a break from work and the office (or home office) is more important than ever, so this event has also incorporated various opportunities to relax, unwind and enjoy some time out in the magnificent surrounds of the Yarra Valley.

The Yarra Valley Tax Retreat Organising Committee looks forward to seeing you in July.



**Rachel O'Donnell, CTA**  
Chair, Retreat Organising Committee

**Early bird offer**

**Register on or before Friday, 24 June 2022 to save!**



# Case study overview

The three workshops throughout the retreat will follow the lifecycle of a couple who are both General Practitioner (“GP”) doctors who branch out from their roles as GPs and establish their own medical practice.

Once established, and as the practice and their private wealth portfolio continues to grow, they will be faced with several considerations regarding diversification of their wealth through property investment, particularly as they look to escape the business of their day-to-day lives and get out of the city for the weekends in the countryside.

Despite being financially rewarding, the expansion of the medical practice and their busy lifestyle eventually all becomes too much. Ultimately, the increased pressures lead to a marriage breakdown, which is inflamed and complicated by an affair and a new relationship.

The breakdown of their marriage raises several taxation implications, including the tidying up of their business affairs and various implications for their estate and succession planning.

A death within the family creates a further set back and emotional strain for the family, as well as throwing up a new range of taxation issues to be addressed, especially with regard to the family SMSF.

Post the separation, an opportunity arises for the disposal of the business, raising the need to consider potential Small Business CGT Concessions and other potential CGT relief.

Finally, they are left to navigate the complexities associated with dismantling the business and personal structures, and considerations with regard to succession and control of family wealth within blended families.



# Technical Program

## Day 1 Thursday, 21 July 2022

Time	Session
9.30 – 9.55am	Registration and light morning tea
9.55 – 10.00am	<b>Welcome and opening address</b> Speaker: Rachel O'Donnell, CTA, Chair, Retreat Organising Committee
10.00 – 11.00am	<b>Session 1: Setting up your structure – considerations when commencing a new business</b> Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers  Choosing the appropriate structure is one of the key decisions when commencing a new business. The decision regarding what structure to adopt will involve balancing factors such as commercial suitability, asset protection, regulatory requirements and the ability to expand, bring in outside investors, reward employees, and access tax concessions (both on start-up and sale). Against this background, and in the context of a medical practice, Linda will address: <ul style="list-style-type: none"><li>• The pros and cons of different structures</li><li>• Asset protection and income splitting</li><li>• Exit and / or bringing in outside investors and</li><li>• Employee issues including incentives.</li></ul>
11.00am – 12.00pm	<b>Session 2: Main residence exemption: is it the devil or an angel in the details?</b> Speakers: Neil Brydges, CTA, Sladen Legal; Edward Hennebry, FTI, Sladen Legal  A person's main residence in many cases is their most significant asset. The tax concessions available on a main residence are arguably the most generous in the tax legislation. However, in some cases, actions, inactions, or wrong decisions can result in the main residence exemption being lost in whole or part. Against this background, and in the context of the main residence exemption, the presenters will address: <ul style="list-style-type: none"><li>• Deriving income from a main residence</li><li>• Demolishing and rebuilding</li><li>• Relationship breakdowns</li><li>• Asset protection</li><li>• Succession and deceased estate issues and</li><li>• Foreign residents.</li></ul>
12.00 – 1.00pm	Lunch

# Technical Program

## Day 1 Thursday, 21 July 2022 continued

Time	Session
1.00–2.00pm	<p><b>Session 3: Property investment and diversifying wealth</b> Speaker: Andrew Henshaw, CTA, Velocity Legal</p> <p>In an attempt to diversify their wealth investments coupled with a desire to escape the day to day of their main income activity, clients often invest in subsequent properties/homes. In many cases these include small farms undertaking a certain level of primary production activities.</p> <p>Over the past few years with an increase of remote work and also a desire to get away from the city, such activity has been even more attractive.</p> <p>Along with the many other adjustments to consider, such an investment can give rise to several taxation considerations.</p> <p>This session explores the various aspects of the taxation implications including:</p> <ul style="list-style-type: none"><li>• State Taxation considerations and potential concessions</li><li>• Whether the activity amounts to a hobby or a business</li><li>• CGT and active asset considerations</li><li>• Primary production concessions and</li><li>• Structuring considerations.</li></ul>
2.00–3.00pm	<p><b>Workshop 1: Set up and growth</b> Workshop Leader: Daniel Angelovich, PWS Advisory Workshop Facilitator: Neil Brydges, CTA, Sladen Legal</p> <p>This workshop will focus on the appropriate business structure to operate the medical practice and also on associated areas to be considered in running a medical practice or similar business, including such things as the employee/contractor distinctions, limitations on business structures and income splitting, and flexibility for business growth and expansion.</p> <p>It will also consider the CGT main residence exemption and state and federal taxation implications arising from diversification of wealth in property, particularly with regard to primary production.</p>
3.00–3.30pm	Afternoon tea



# Technical Program

**Day 1**      Thursday, 21 July 2022 continued

Time	Session
3.30–4.30pm	<p><b>Session 4: When divorce rears its (potentially) ugly head – managing tax issues that arise in a marriage or relationship breakdown</b></p> <p>Speaker: Paul Hockridge, CTA, Hockridge Advisory</p> <p>Marriage and relationship breakdowns can cause substantial stress for our clients. Helping them traverse the tax implications along this rocky road can alleviate some stress associated with their separation and the division of their assets.</p> <p>Paul will draw from his expertise and experience in navigating this course with his clients, and provide insight for practitioners to comfortably guide their clients through issues including:</p> <ul style="list-style-type: none"><li>• CGT and stamp duty on property settlements and transfers of business and investment assets</li><li>• Capital allowance and trading stock rules</li><li>• Subdivision 126-A rollovers – elements and consequences</li><li>• Tidying up loan accounts and unpaid present entitlements – dealing with debt forgiveness, accrued losses, Division 7A, and section 100A (particularly the exception for ‘ordinary family dealings’)</li><li>• Trust splitting and other family trust issues</li><li>• Child maintenance trusts and</li><li>• Potential professional conflicts for advisors who have previously worked for both partners, or for the business entity / group.</li></ul>



# Technical Program

## Day 1 Thursday, 21 July 2022 continued

Time	Session
4.30 – 5.30pm	<p><b>Session 5: Deceased estates and tax-effective estate planning: Some key issues</b></p> <p>Speaker: Miranda Stewart, CTA, University of Melbourne Law School</p> <p>Effective estate planning can be achieved only with a thorough understanding of the tax consequences of death. This session will cover some of the key tax issues that should be considered when embarking on estate planning for your clients, including:</p> <ul style="list-style-type: none"><li>• Management of the final year, deceased estate and testamentary trust tax returns</li><li>• Treatment of income and expenses, and capital gains including the Div 128 CGT rollover</li><li>• Thinking of community: charitable giving on death and</li><li>• The interaction of estate planning with various assets and entities, including succession planning for businesses.</li></ul>
5.30 – 6.30pm	Delegate free time
6.30 – 10.00pm	Yarra Valley showcase and retreat dinner



### Yarra Valley showcase and retreat dinner

Showcasing the best of the Yarra Valley, join your colleagues, peers and our esteemed presenters for an evening of networking. Keep toasty by the fire, enjoy divine wine and delicious food from Victoria's premier wine region.

**Date:** Thursday, 21 July 2022

**Time:** 6.30–10.00pm

**Venue:** RACV Healesville Country Club & Resort

**Price:** Inclusive for all full registration delegates  
\$150 for additional tickets – see registration form for details

**Dress:** Business or business casual

# Technical Program

## Day 2 Friday, 22 July 2022

Time	Session
8.30–9.30am	<p><b>Session 6: Divorce, death and super – how to exit an SMSF</b> Speaker: Philippa Briglia, Sladen Legal; Phil Broderick, CTA, Sladen Legal</p> <p>Exiting an SMSF can have its challengers, particularly as a result of a divorce or death. In this session, Phil and Philippa will discuss these issues including:</p> <ul style="list-style-type: none"><li>• Options and procedural requirements for exiting a member on divorce</li><li>• Liquidity issues and in specie transfers from SMSFs in the context of death and divorce</li><li>• Key steps on death of a member, including super law requirements and practical considerations and</li><li>• Tax considerations in relation to payment of death benefits.</li></ul>
9.30–10.30am	<p><b>Workshop 2: Death and divorce</b> Workshop Leader: Mark Gioskos, FTI, Victorian Bar Workshop Facilitator: Philippa Briglia, Sladen Legal</p> <p>This workshop will expand on the case study introduced in Workshop 1, as the breakdown of the couple's marriage and a death in the family give rise to further tax-related complexities. We will explore the various tax issues arising for the couple on dividing their assets, including their interests in the medical practice and the rural property. We will also consider how the tax law operates in the administration of the deceased estate. Finally, we will consider the impact of the marriage breakdown and the family member's death in relation to an SMSF.</p>
10.30–11.00am	Morning tea

“All the sessions were excellent, particularly the plenary sessions leading into workshops.  
Great start to this new annual event!”

2021 past attendee



# Technical Program

## Day 2 Friday, 22 July 2022 continued

Time	Session
11.00am–12.00pm	<p><b>Session 7: Division 152</b> <b>Speaker: Michael Parker, CTA, Hall &amp; Wilcox Lawyers</b></p> <p>Where they apply, the small business tax concessions are generous. But determining eligibility is often complex; more so now than ever with recent changes to the rules meaning extra tests that need to be met in some cases. Claims are also attracting ATO attention with justified trust programs having revealed to the ATO that some ineligible businesses have mistakenly claimed, triggering this to become a current area of ATO review focus. Against that background, in this session Michael will address:</p> <ul style="list-style-type: none"><li>• What the recent changes are and how they impact the analysis required – including the effect of changes in the definition of ‘stakeholder’</li><li>• Considerations that arise in respect of exiting stakeholders</li><li>• The use of the concession when restructuring follows a family split</li><li>• Other common traps encountered and what you can do to support claims and</li><li>• Interaction with CGT rollovers – particularly under subdivision 126-A.</li></ul>
12.00–1.00pm	<p><b>Session 8: How we all became the Brady Bunch! Navigating tax, super and structuring issues for blended families</b> <b>Speaker: Leanne Connor, CTA, WGC Business Advisors</b></p> <p>Relationships can cause friction and issues that call for practical resolutions to enable a family business to thrive. The delicate balancing act is often even more fragile for clients who re-partner and create blended families. Practitioners need to be attuned to possible issues and provide practical solutions to handle clients’ second or third marriages, especially when there are children from different relationships. We need to consider numerous factors, such as:</p> <ul style="list-style-type: none"><li>• Who has control of family wealth through their roles as directors, shareholders, trustees, appointors, beneficiaries, and SMSF members?</li><li>• Is there an imbalance of power or sibling rivalry tied up with the business or extraneous to it?</li><li>• Who works in the business? Are they being appropriately compensated or are they pumping their earnings back into the business? Are some family members slogging it out in the business whilst others are simply along for a ‘free ride’?</li><li>• What issues can arise when a client puts everything into their business, leaving no assets that can be dealt with separately?</li><li>• What issues can arise in relation to trust distributions?</li></ul> <p>Leanne will share her wealth of experience to provide insight for practitioners to apply in helping our own clients navigate the minefield and accommodate various family members in a balanced and equitable manner. This practical session will focus on how to handle blended family matters, as demonstrated through the use of real-life examples to highlight the issues and provide potential solutions.</p>
1.00–2.00pm	Lunch

# Technical Program

## Day 2 Friday, 22 July 2022 continued

Time	Session
2.00–3.00pm	<p><b>Session 9: When it all needs to come undone – Dismantling structures</b> Speaker: Mark Molesworth, CTA, BDO</p> <p>There comes a time when our clients want or need to retire. Some do so by selling their business or handing it down to the next generation and immediately taking on retirement pursuits. Others prefer to transition to retirement gradually, in line with a detailed and gradual succession plan. Either way, their retirement and the succession of the business will have tax consequences that can vary significantly depending on the business structure, tax profile of various assets and taxpayers, and the steps taken to give effect to the succession and retirement.</p> <p>Practitioners should consider the tax implications of likely strategies well before their client begins writing their retirement speech or LinkedIn post. This session will delve into the tax implications arising from the dismantling of structures and the implementation of succession plans for family businesses, including:</p> <ul style="list-style-type: none"><li>• Exiting stakeholders and structures, including the impact that this can have on the tax profile of family entities</li><li>• Extracting personal wealth and assets from an entity upon or in the lead-up to retirement</li><li>• Separating out one or more businesses and / or investments between family members or entities</li><li>• Transferring assets to related family entities</li><li>• Application of the share buy-back provisions</li><li>• Funding succession / transition and</li><li>• Earn-out arrangements.</li></ul>
3.00–4.00pm	<p><b>Workshop 3: Succession and retirement</b> Workshop Leader: Karen Goodfellow, CTA, Tappli Pty Ltd</p> <p>Workshop 3 will tease out the issues raised when our GPs come to sell their medical practice and dismantle the business and personal structures supporting it, taking into account that, as they are no longer married, they have different circumstances, priorities and goals.</p> <p>Among other things, we will explore application of the Small Business CGT Concessions to the sale of the practice, how to access the proceeds of sale in a tax effective manner to fund retirement, the tax consequences of winding up the legal structure, and managing the latent consequences of having used Subdiv 126-A marriage breakdown rollover upon divorce.</p>
4.00pm	Closing address and networking drinks

# Presenters

**Philippa Briglia** is a senior associate at Sladen Legal and works with Phil Broderick in the superannuation team. She has extensive experience in advising on the superannuation regulatory framework, particularly in an SMSF context. She regularly provides advice on complex structures and arrangements involving SMSFs and SMEs. Philippa has been published in numerous industry publications, including the Tax Institute Journal. She has presented at seminars and conferences held by the Tax Institute, the Television Education Network, and Leo Cussen Centre for Law.

**Phil Broderick, CTA**, is a principal of Sladen Legal and heads its superannuation team. He is a member of a number of superannuation related committees. This includes being the co-chair of The Tax Institute's superannuation committee and the chair of SISFA's technical and policy committee. He is also a member of a number of the ATO's superannuation liaison groups including the Superannuation Industry Relationship Network (SIRN) and the Superannuation Industry Stewardship Group (SISG). Phil is also heavily involved in liaising with Treasury and ATO in relation to the implementation of new super laws and administrative practices. Phil's areas of practice include superannuation, duties and state taxes, estate planning and succession, trusts, federal tax and business

structuring. Phil was listed in 2020 to 2023 editions of Best Lawyers Australia for superannuation law and was the winner of the SMSF Association's SMSF Specialist Advisor (SSA) Top Achiever Award in 2019. His articles have featured in The Tax Institute's Taxation in Australia Journal and CCH's Super News. He has presented at seminars and conferences conducted by The Tax Institute, the SMSF Association, the Television Education Network, Legalwise and various accounting bodies.

**Neil Brydges, CTA**, is a Principal Lawyer in Sladen Legal's Tax group. Neil practises in all areas of direct and indirect tax, with a particular focus on the taxation of trusts, corporate tax, M&A, Div 7A, and cross-border issues. Using his technical tax knowledge, Neil works with clients to obtain commercial and practical outcomes and Neil has particular experience in dealing with the ATO on complex tax issues in a dispute resolution context. Neil is a keen and active member of the tax community. As well as presenting on tax topics at various sessions, he has authored and co-authored several published articles and papers. Neil is an Accredited Specialist in Taxation Law and Chair of the Tax & Revenue Law Committee with the Law Institute of Victoria, a member of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser and member of Dispute Resolution Technical Committee with The Tax Institute.

**Leanne Connor, CTA**, is a Director of WGC Business Advisors, a chartered accountancy firm specialising in taxation and strategic advice to SMEs and high net worth individuals. Leanne has over 30 years experience providing accounting, business advisory, strategic superannuation and taxation services. Leanne's areas of expertise include tax and superannuation planning, business restructuring and understanding the fundamental issues relating to SMSFs, family trusts and private companies. Leanne is a Director and National Council member of The Tax Institute and past chair of its Victorian State Council & PD Committee. She is a regular presenter for The Tax Institute and winner of the 2020 SME Tax Adviser of the Year Award.

**Edward Hennebry, FTI**, is a Senior Associate in the Business Law team at Sladen Legal. Edward commenced his career in the ATO's Tax Counsel Network and Review and Dispute Resolution Business Lines. Since leaving the ATO, Edward has worked in a number of large accounting and national law firms, enabling him to diversify his knowledge of prevalent tax and commercial issues that affect private clients and family groups across a wide range of industries.

**Andrew Henshaw, CTA**, lives and breathes tax. He is passionate about getting wins for his clients, solving difficult legal issues

and giving clear practical advice. Andrew has been a Director of Velocity Legal since the firm was founded in 2016. Andrew acts for a diverse range of private businesses, high net-wealth individuals and family groups. While Andrew specialises in difficult tax disputes and complex tax advice, he prides himself on distilling his legal analysis into clear practical advice. Andrew is a Chartered Tax Advisor with the Tax Institute. He is an active contributor in the tax community, and frequently publishes his insights through his blog 'Life, Death and Taxes', law reform bodies and other tax publications. Andrew is also a regular presenter, through forums including the Institute of Public Accountants, CPA Australia, the Television Education Network, Legalwise and TaxTalks. Andrew holds a Bachelor of Commerce and a Bachelor of Laws from Monash University, and a Masters of Law from the University of Melbourne.

**Paul Hockridge, CTA**, is the Principal of Hockridge Advisory. He has worked for the ATO, a large law firm, has been a partner in medium and Big 4 chartered accounting firms and has over 30 years' experience in tax, asset protection, estate and succession planning. Paul's niches include litigation support, property development and FBT and salary packaging. Paul specialises in advising high wealth families and closely held businesses, as well as providing support for a number of

# Presenters

accounting and law firms. Paul maintains a practicing certificate as a legal practitioner in Victoria, is a fellow of Chartered Accountants Australian and New Zealand, is senior fellow and teaches in the Masters program in the Law School at the University of Melbourne and is a chartered tax adviser. He sits on The Tax Institute's FBT and Employment Taxes Committee and contributes to The Tax Institute's book, *Estate and Business Succession Planning*. Perhaps Paul is best known as a regular presenter at local, State and National Tax Institute conferences.

**Mark Molesworth, CTA**, is a tax partner at BDO and a member of The Tax Institute's SME Technical Subcommittee and the Queensland State Technical Committee. He is also a member of the expert advisory panel to the Board of Taxation. Mark has many years of experience in advising taxpayers with respect to all areas of taxation, including CGT, FBT and income tax. He also provides taxation advice to other smaller accounting and legal practices in respect of their clients.

**Michael Parker, CTA**, is a Partner in the Taxation section of Hall & Wilcox Lawyers. His practice focuses on tax disputes, domestic income tax issues, including CGT and Div 7A, business sales, acquisitions and restructures and GST. Michael has extensive experience handling a broad range of taxpayer

disputes, including disputes concerning the small business CGT concessions, having acted for the taxpayers in *White v FCT* [2009] FCA 880, *White v FCT* [2012] FCA 109 and *Altnot v FCT* [2013] AATA 140, among other cases. Michael regularly consults to the Board of Taxation and Treasury, including in respect of Div 7A, small business impediments and the small business CGT concessions. He is a regular presenter for The Tax Institute.

**Miranda Stewart, CTA**, is Professor of Law at the Melbourne Law School, University of Melbourne and an honorary Professor at the Tax and Transfer Policy Institute, Crawford School of Public Policy, Australian National University. Professor Stewart teaches, researches and consults on a wide range of tax law and policy issues including the tax consequences of death. Her most recent book is *Death and Taxes: Tax-Effective Estate Planning* (Thomson Reuters, 2022) with Michael Flynn QC.

**Linda Tapiolas, CTA**, is a Partner in the Cooper Grace Ward Lawyers Commercial team. She provides a range of support services to accountants, financial planners, and other professional advisers. This includes technical advice on complex tax, CGT and Div 7A issues, as well as acting on business sales and acquisitions to ensure clients achieve commercial and tax-effective outcomes. Prior to joining Cooper Grace Ward, Linda

worked as an accountant for 18 years advising clients on capital gains, business acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions

## Workshop Leaders

**Daniel Angelovich** is Director of the PWS Business Advisory team. Daniel graduated from Deakin University with a Bachelor of Commerce (with distinction) and Law and completed a Masters in Taxation at the University of Melbourne. He is a Chartered Accountant. Whilst specialist taxation consulting and advisory services are Daniel's area of expertise, he works closely with his team and associates to provide a full financial service offering. By listening to his clients' goals and objectives, Daniel assists his clients in improving their personal and financial well-being, and ultimately achieve greater peace of mind.

**Mark Gioskos, FTI**, is a barrister at the Victorian Bar, and practises in taxation law, commercial law, and public and administrative law. Prior to the Bar, Mark practised as a solicitor for nearly 10 years, most recently as a special counsel at Thomson Geer. During that time, he advised in a variety of taxation and commercial disputes, with an emphasis on achieving efficient and commercial

outcomes for his clients. Mark has represented government agencies, listed and multinational groups, small and medium-sized enterprises, high net worth families, and not-for-profit organisations. He is experienced in every stage of engagement with revenue authorities, from review and audit through to tribunal and court proceedings. Mark holds a Master of Laws from the University of Melbourne and is a Fellow of The Tax Institute. He lectures on various topics for The Tax Institute's Chartered Tax Adviser Program and is a member of various professional committees. Mark has written several articles published in professional journals, and is a regular presenter at conferences and seminars. Mark was recently named as a winner of the Australasian Lawyer 2022 Rising Star awards.

**Karen Goodfellow, CTA**, is an experienced tax professional. She is a consultant, author and presenter with extensive experience in the tax advising and education (CPD/CPE) space. As the founder and operator of two successful tax training businesses Karen has detailed knowledge of Australia's federal tax system. Karen's extensive experience providing tax advice and training gives her an excellent understanding of the most pressing issues facing tax practitioners including the taxation of trusts, Capital Gains Tax and Division 7A.



# Venue and accomodation



## RACV Healesville Country Club & Resort

122 Healesville-Kinglake Rd, Healesville VIC 3777

The RACV Healesville Country Club & Resort provides a range of leisure, dining, accommodation and event options in the heart of Victoria's premier wine and fresh produce region, the Yarra Valley. Explore all the region has to offer, including wineries, galleries, wildlife, walking trails, adventure activities and local produce suppliers.

### Getting there

The resort is approximately a 90-minute drive from Melbourne Airport (Tullamarine) or Melbourne CBD. Car hire is readily available at Melbourne Airport and we encourage you to book when registering for the event.

### Parking

RACV Healesville Country Club & Resort has free parking available for retreat guests.

### Accommodation

RACV Healesville Country Club & Resort offers luxurious accommodation with stunning views of the resort. Accommodation is limited, book early to avoid disappointment.

A corporate rate has been negotiated with RACV Healesville Country Club & Resort. Please call 03 5962 4899 and quote "The Tax Institute" to secure your booking.

Please note that as per hotel booking conditions, all accommodation booked is non-refundable. All additional hotel incidentals, including breakfast, remain the responsibility of delegates, and individuals will be responsible for payment of the balance of their account when checking out of the hotel. Please note that extra charges may be incurred for additional guests and will be charged to individual room accounts upon checkout.

Planning to stay for the weekend? As accommodation is limited, we recommend you book your accommodation as soon as possible to avoid disappointment.

For more accommodation options, please [click here](#)



# Stay and play in the world-famous Yarra Valley

The Yarra Valley is widely renowned as Victoria's premier wine region, however there is an extensive number of other unique experiences for you to enjoy too. From hot-air ballooning to cycling and wildlife spotting, there is something for everyone! Some highlights are below, but for more information head to [www.visitarravalley.com.au](http://www.visitarravalley.com.au) to plan your stay.

## Golf pros

RACV Healesville Country Club & Resort offers an 18-hole golf course. Surrounded by beautiful native trees and vegetation, the Michael Clayton designed 18-hole course offers members a unique playing experience.

Bookings are essential. To book please call 03 5969 9451 and quote "The Tax Institute". Green fees – 9 holes cost \$34pp, 18 holes \$40pp. There is also a Pro Shop team onsite who will be able to assist with equipment hire bookings.

## Spa fans

You deserve to pamper yourself! Book a relaxing massage or treatment at the onsite One Spa. Located at RACV Healesville Country Club & Resort, making it easier than ever to restore the mind and body before or after the conference.

Bookings are essential. To book, please contact One Spa on 03 5969 9388.

## Thrill seekers

Soak up the fresh air in the picturesque Victorian countryside by completing one of the many walking or cycling trails. The ever-popular Lilydale-Warburton Rail Trail will provide wonderful views of the scenery, while those who would like more of a challenge could attempt to cycle to the Mt Donna Buang summit.

Experience the ultimate adrenaline rush and the region from above, with Hot Air Ballooning, plane rides and sky diving.

## History buffs

A must visit for all history buffs is Coombe Yarra Valley. Once the home of Dame Nellie Melba, the estate is a bustling seven acres of stunning gardens famous for its high teas and Devonshire tea. Learn about the life of Dame Nellie Melba and her ever important role in Australian history.

Climb aboard Puffing Billy Railway, an iconic attraction in the area. Weave through forests and over historical trestle bridges as you make stops in a variety of local towns along the way.





# Stay and play in the world-famous Yarra Valley

## Art enthusiasts

You'll find plenty of private galleries dotted across the region, highlights include Forging Ahead Metal Sculptures, TarraWarra Museum of Art, Monsalvat Art Centre and The Waterwheel Art Gallery at Warburton.

## Wildlife warriors

Take a short 10-minute drive to Healesville Sanctuary where you can wander through serene tracks and meet over 200 species of Australian animals. You will be in awe of the beauty, strength and power of the Australian wildlife. With daily shows including: Spirits of the Sky and Tales from Platypus Creek, this is an experience not to be missed.

## Snow lovers

Take a drive to one of Victoria's many pristine alpine mountains. You could be enjoying the snow in just under an hour at Mount Donna Buang or Lake Mountain.

## Food, wine and drink connoisseurs

With over 80 cellar doors, it's easy to eat and drink your way around the Yarra Valley. A variety of food and wine tours operate 7 days a week.

Home to the world's best gin, Four Pillars Gin is the first Australian distillery to be awarded International Gin Producer of the Year in 2019. Visit the iconic distillery in Healesville and immerse yourself in one of their distillery masterclasses. These classes sell out very early, bookings are essential.

A must attend is the Yarra Valley Chocolaterie, just out of Yarra Glen. Taste their delicious creations or attend a chocolate marking workshop.

Yarra Valley harvests some of the best produce, including berries, limes, lemons and kiwi fruit. Fresh is always best, with an abundance of U-Pick farms, there is always something delicious in season to pick.

Operating every Saturday from 8.30am to 1pm in Healesville, the Yarra Valley Organic Farmers Market is a must to get the freshest organically grown produce at affordable prices.

For more information or ideas for your stay [click here](#).



# Event information

## Registration inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Conference lunches	Yarra Valley Showcase, retreat dinner and closing drinks*
<b>Face-to-face full registration</b> This registration option entitles one delegate to attend the entire event.	✓✓✓	✓✓✓	✓✓✓

\*Additional tickets to the Networking function can be purchased on the registration form

## Early bird registration

All registrations received and paid on or before Friday, 24 June 2022 will be entitled to an early bird discount.

**Please note:** The registration fee does not include accommodation, hotel incidentals or transfers.

## Group Discounts

Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

## Confirmation of registration

Please note you will receive two separate emails in the form of a tax invoice at the time of payment and a confirmation email at registration completion.





# Event information

## Continuing Professional Development

Attendance at the conference counts for 12 hours of Continuing Professional Development with The Tax Institute.

## The Tax Institute's Attendee Hub

This event will be accessible to all delegates via our dedicated Attendee Hub. Program information, materials (technical papers and presentations), survey forms and more will be available via The Tax Institute's virtual Attendee Hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the Attendee Hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual Attendee Hub by email.

## Delegate list

A delegate list will be included on the Attendee Hub to assist with networking. Please indicate at the time of registration if you do not want your name to be included. Alternatively, you can edit your profile visibility settings in the Virtual Attendee Hub at any time during the event.

## Dress code

Business or business casual attire is suitable for the duration of the conference.

## Networking functions

### Yarra Valley showcase and retreat dinner – RACV Healesville Country Club & Resort

Following a day of technical sessions, delegates are invited to unwind with the casual style retreat dinner featuring the finest fresh produce and wines from the Yarra Valley region.

Participate in the pre-dinner Yarra Valley showcase where local food and drink providers will come to you exhibiting the best of the Yarra Valley. The Yarra Valley showcase and retreat dinner is included in the registration fee for full retreat delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$150.

## Retreat closing drinks – RACV Healesville Country Club & Resort

Toast the closing of the retreat with award winning wines from Victoria's premier wine region. The Retreat closing drinks function is included in the registration fee for full retreat delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$35.

Please indicate your requirements, including dietary requirements and requirements for any additional guests, at the time of registration.

## Special dietary and accessibility requirements

Please indicate any special dietary requirements at the time of registration. Please email us with any accessibility requirements at [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).



# Event information

## COVID-19 Event Guidelines

At The Tax Institute, the health and wellbeing of our members, delegates and employees is our top priority. Whilst returning to face-to-face events, we continue to actively monitor the situation regarding COVID-19 and follow the latest advice and guidelines issued by the Department of Health, the World Health Organisation and relevant State authorities.

Please note, final implementation of any of these measures is subject to Federal and State Government requirements at the time of each event. To see The Tax Institute's full COVID-19 Event Guidelines, [click here](#).

## Cancellation Policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

If a registered delegate is unable to attend as a result of a diagnosis of COVID-19 or they are experiencing symptoms of COVID-19, a full refund will be offered with the provision that a medical certificate is produced explaining the diagnosis or a summary of the appropriate action to be taken i.e. a COVID-19 test and medical advice.

If a registered delegate is unable to attend a face-to-face event as a result of interstate border closures or they reside in or visited a COVID-19 hotspot, we will endeavour to transition the registration to an online registration for the event. If there is a difference in price a credit will be provided to delegates to be used at a future event. If a delegate does not wish to transition their registration to the alternate online event, a full refund/credit will be provided.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working

days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

## Privacy

We take your privacy seriously, and our policy can be viewed at: <https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer>.

## Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au).



A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

## 1 Registration

### Face to face registration – 12 CPD hours

	Member	New member*	Non-member
<b>Early bird registration</b> Received on or before 24 June 2022	<input type="checkbox"/> \$1,450	<input type="checkbox"/> \$1,790	<input type="checkbox"/> \$1,750
<b>Standard registration</b> Received after 24 June 2022	<input type="checkbox"/> \$1,650	<input type="checkbox"/> \$1,990	<input type="checkbox"/> \$1,950

☐ I understand that the registration fees do not include printed materials. Access to materials will be electronic.

Promotional code:

### Networking functions

The networking functions are INCLUDED in the registration fee for delegates attending the full conference.

**Yarra Valley showcase & retreat dinner | Thursday, 21 July 2022 at RACV Healesville Country Club & Resort**

- ☐ Yes, I WILL be attending the Yarra Valley showcase & retreat dinner OR
- ☐ No, I WILL NOT be attending the Yarra Valley showcase & retreat dinner
- ☐ Yes, I require additional tickets for the Yarra Valley showcase & retreat dinner at \$150 per person

No.  x tickets at \$150 each: \$

Dietary requirements:

### Retreat closing drinks | Friday, 22 July 2022 at RACV Healesville Country Club & Resort

- ☐ Yes, I WILL be attending the Retreat closing drinks OR
- ☐ No, I WILL NOT be attending the Retreat closing drinks
- ☐ Yes, I require additional tickets for the Retreat closing drinks at \$35 per person

No.  x tickets at \$35 each: \$

Dietary requirements:

## 2 Delegate contact details

Member no.:

If your member details are up-to-date, you can skip this section.

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb:  State:  Postcode:

Telephone:  Mobile:

Email:

☐ Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking

### \*Become a member and save!

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and save with:

- up to 50% off membership to 30 June 2023
- member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at [info.taxinstitute.com.au/membership](http://info.taxinstitute.com.au/membership).

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature:

## 4 Payment summary

Registration fees	\$	<input type="text"/>
Additional guest tickets – Yarra Valley showcase & retreat dinner (\$150 each)	\$	<input type="text"/>
Additional guest tickets – closing drinks (\$35 each)	\$	<input type="text"/>
<b>Total payable</b>	\$	<input type="text"/>

Please note: The Tax Institute cannot accept responsibility for delegates' late flight arrivals.  
Transfer costs are non-refundable and non-transferable.

## 5 Payment method

Please note: all registration payments must be made prior to the event, unless other arrangements have been made with The Tax Institute.

- ☐ **Cheque payable to The Tax Institute** (in Australian dollars)
- ☐ **Credit card** Card type: ☐ AMEX ☐ Visa ☐ MasterCard ☐ Diners

Name on card:	<input type="text"/>	
Card no.:	<input type="text"/>	Expiry date: <input type="text" value="MM/YY"/>
Cardholder's signature:	<input type="text"/>	

For our refund, cancellation and replacement policy visit [taxinstitute.com.au/professional-development/event-policy](https://taxinstitute.com.au/professional-development/event-policy).

For event enquiries, please contact the National Events Team on 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au)

For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

**Collection notice:** The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at [www.taxinstitute.com.au](https://www.taxinstitute.com.au). [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

**To register**

Email [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

Mail L37, 100 Miller Street North Sydney NSW 2060

Online [taxinstitute.com.au/YarraValleyTaxRetreat](https://taxinstitute.com.au/YarraValleyTaxRetreat)

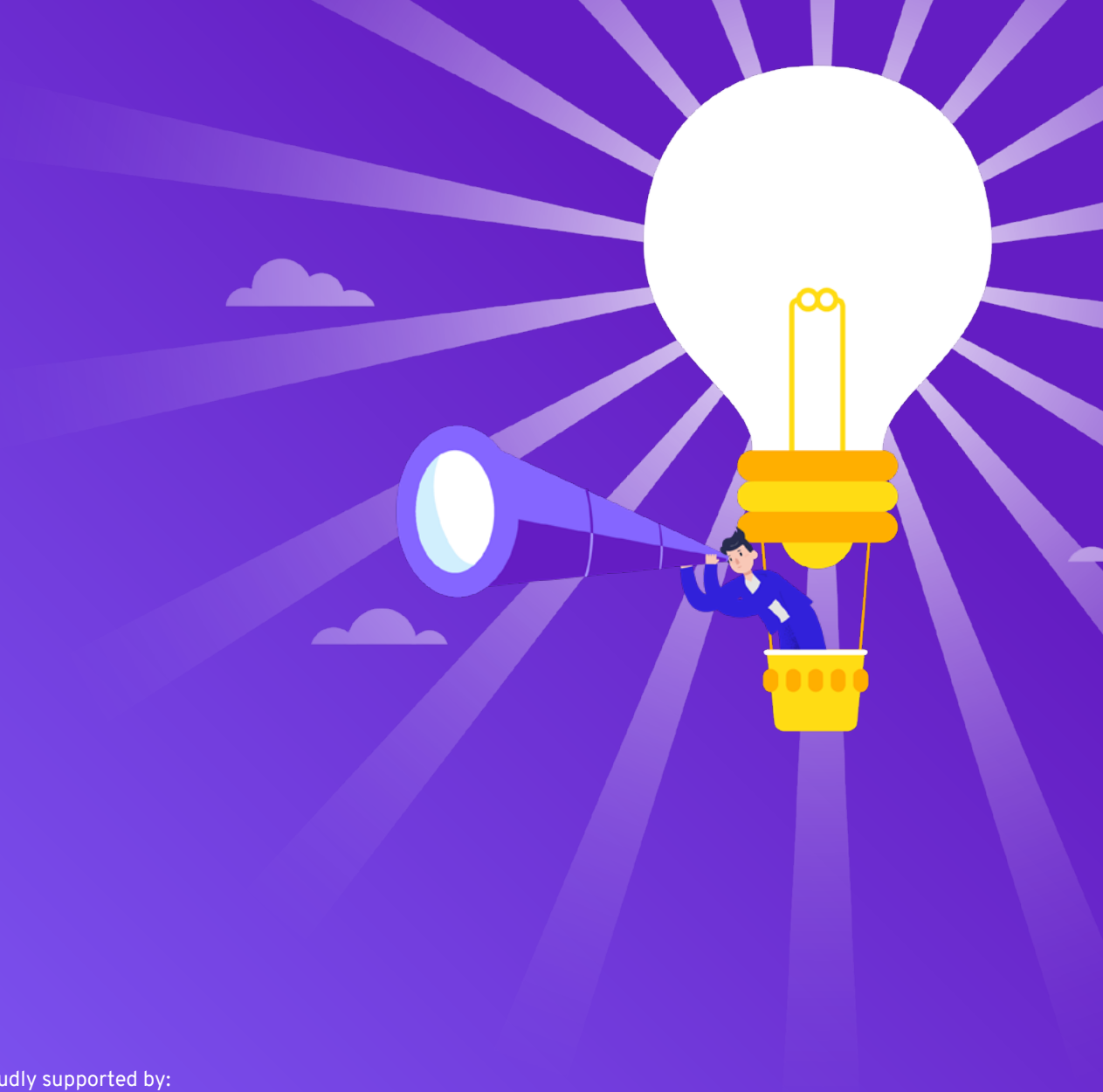


# Thank you.





The Tax Institute gratefully acknowledges the generous assistance of members of the Organising Committee:

Rachel O'Donnell, CTA,  
(Chair, Yarra Valley Tax Retreat Organising Committee)  
Daniel Angelovich, PWS Advisory  
Megan Bishop, Holding Redlich  
Neil Brydges, CTA, Sladen Legal  
Mark Gioskos, FTI, Victorian Bar  
Stuart Glasgow, CTA, HID Group  
Karen Goodfellow, CTA, Tappli Pty Ltd  
Fiona Knight, CTA, Australian Taxation Office

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