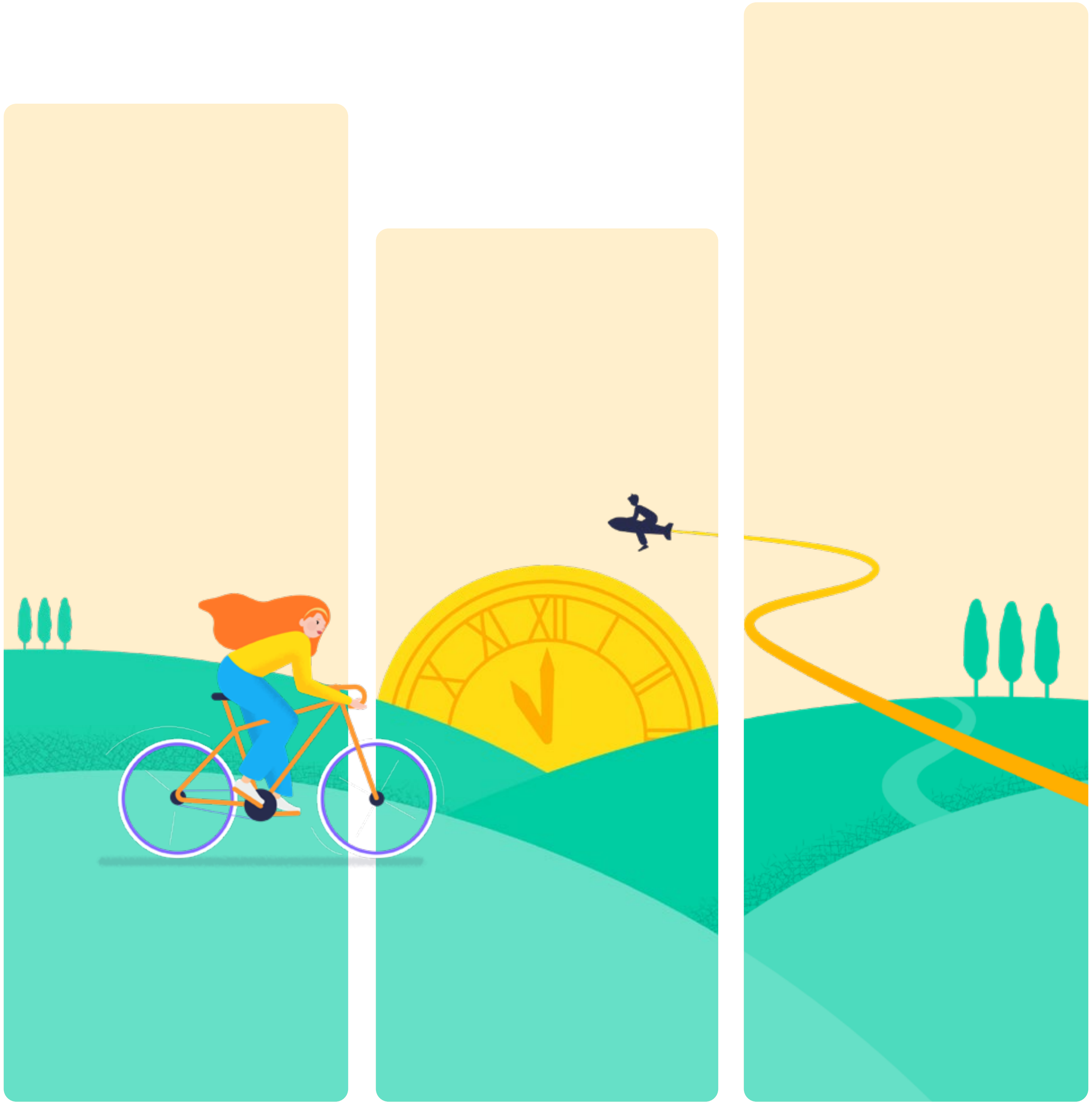
The Tax Institute

Barossa Convention

10–12 August 2022

Novotel Barossa Valley Resort

12 CPD hours



Welcome

Back to the Future

It is with great pleasure that I extend a warm welcome to you to join us in the picturesque surrounds of the historic Barossa Valley for The Tax Institute's Barossa Convention. This event has a rich history and tradition which makes it South Australia's premier event for tax professionals who predominantly practice in the SME space.

I would also like to take this opportunity to thank all our speakers who have generously agreed to volunteer their time to share their expertise.

High Quality Program

The Convention Organising Committee has brought together a diverse range of high-profile, expert presenters from across the profession to deliver the top-quality technical sessions. There'll be plenty of key takeaways with all sessions to have practical examples, tips and strategies delivered in a range of formats including case studies, panels and plenaries.

Unique Industry Networking and Idyllic Destination

This year we're excited to be heading back to the Novotel Barossa Valley Resort. Where there will be plenty of opportunities to meet up with friends and peers, old and new, from accounting, law, financial services and regulatory bodies.

The Convention Resort overlooks rolling vineyards but why not take time to visit other famous and yet discovered cellar doors before or after the Convention? Use the Convention as an opportunity for an extended break in the Barossa Valley or in many of the incredible attractions SA has to offer visitors. There is plenty to do within the region including food and wine tours, hot air ballooning, cycling, golf plus much more.

Don't hesitate – book now to take early bird registration offers and ensure 2022 is the year you visit the Barossa.

Now is the time to get back to the future – I look forward to seeing you in the Barossa!

Will Fennell, Piper Alderman
Chair, Barossa Convention Organising Committee

Early bird offer
Register on or before 11 July 2022 to save!

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Technical Program

Day 1 Wednesday, 10 August 2022

Time	Session
5:30 – 7:00pm	**Registration**
7:00 – 9:00pm	**Welcome Reception** Hosted by Barossa Convention veteran, Ali Kerr from Wine Direct, guests will enjoy networking and canapes while partaking in a blind wine tasting. Test your wine knowledge through interactive games and you might even take home some fantastic prizes!

Day 2 Thursday, 11 August 2022

Time	Session	Presenters
8:00 – 8:30am	**Registration**	
	Welcome and Opening Address	**Will Fennell** Convention Chair
8:30 – 9:30am	**Session 1: 100A and Division 7A** **“Great Scott!”** This session will provide an update on the ATO’s draft guidance and provide you with the vital information you need to advise your clients and navigate these issues.	**Fiona Dillon, CTA** *Chief Tax Counsel* Australian Taxation Office **Peter Slegers, CTA** Cowell Clarke
9:30 – 10:30am	**Session 2: Life beyond Section 100A and investment structuring** Following the ATO’s various public guidance on section 100A, this session will provide practical observations around the approaches to structuring family businesses and investments, and will explore the following: • Given recent Section 100A rulings, where do you hold passive investments? • Are companies now preferable vehicles even with higher tax rates? • Are trusts now dead and are people moving to corporate structure? • Impact on succession planning structures	**Yan Wong, ATI** Grant Thornton
10:30 – 11:00am	**Morning tea**	

Technical Program

Day 2 Thursday, 11 August 2022 continued

Time	Session	Presenters
11:00am–12:00pm	**Session 3: M&A – Navigating tax in the Risks & Opportunities that exist in a post-COVID world** There was unprecedented government assistance provided to individuals and businesses during the pandemic. The various government lockdowns have resulted, not only in an increase in savings, but also the time to re-think commercial and investment strategy. This has resulted in a much higher volume of M&A transactions than we have seen in a very long time. There are numerous tax issues to consider as part of an M&A deal and this session will many of these including: • CGT rollovers: including in subdiv 615 and 125 and the “and nothing else” requirement, J1 event if you have applied 126-B rollover previously, impact on cost bases, impact on ESIC requirements; • Debt forgiveness rules: In particular debt for equity swaps and the potential impact on tax attributes of the group; • Asset versus share acquisition: Quirks of the tax consolidation regime that can have an impact on value of your acquisition, including application of Instant Asset Write Off, Temporary Full Expensing and Small Business Depreciation to the ACA process, entry history rule, understanding how the “step-up” works. • Contractual terms: Conditions precedent and conditions subsequent and the impact on timing of CGT event, and covering off on relevant indemnities. • Financing arrangements: Understanding critical aspects of Div 974 for the purposes of funding your acquisition, but also the aspects that may impact a target, including the Hybrid Mismatch rules in Div 832.	Mark D’Angelica, FTI BDO
12:00–1:00pm	**Session 4: South Australian Deeds** As South Australian practitioners what should we be looking for in trust deeds? This session considers some common issues around trust deeds from a South Australian perspective including: • Beneficiaries: who do we want and can we change them? • A trustee’s ability to benefit • Perpetuity issues when holding interstate assets • Extending vesting	Julie Van der Velde, CTA VdV Legal
1:00–2:00pm	**Lunch**	

Technical Program

Day 2 Thursday, 11 August 2022 continued

Time	Session	Presenters
2:00 – 3:00pm	**Session 5: An adviser's duties to a client** Lawyers and Tax Agents can be placed in difficult situations where a client asks for advice that is considered by the Commissioner as being tax effective and at a heightened risk of ATO enquiry and audit. The most obvious example is the annual distribution of trust profits. Despite the Commissioner's stated position in TR2022/D1, clients will still demand advice on achieving trust distributions that lead to a lower effective tax cost. What are the regulatory issues facing an adviser in these types of situations? In this presentation the following issues affecting advisers will be considered: • A comparative analysis of legal practitioners and tax agents for giving tax advice • If a client requests tax advice that is considered as being "risky" is the tax advisor compelled to provide the advice sought? • What are the issues that an adviser faces if the Commissioner disputes a transaction that has been advised on and issues a penalty assessment? What right does the trustee have? How can an advisor mitigate any potential loss from an aggrieved client? • The potential application of other laws such as the Australian Consumer Law, Promoter Penalties, Criminal Code and the general provisions of Taxation Administration Act, will also be considered	**Arthur Athanasiou, CTA-Life** Thomson Geer Lawyers
3:00 – 3:30pm	**Afternoon tea**	
3:30 – 4:15pm	**Session 6: Professional practice profits allocation + PSI** ***"Believe me, it makes perfect sense!"*** When does your practice transition from sole practitioner to having a business structure for tax purposes and does it matter (you can split income off, but what if you get audited)? Initially people were panicking following the release of the ATO Professional Practice "guidance" and thinking they need to change everything. Is there really cause for concern or is this just misinformation? A difficulty in translating the PCGs into reality has caused great confusion so this session will go back to the beginning of PSI, then take you on a journey to glimpse the future of professional practice structuring and profit allocation.	**Sonia Mascolo, CTA** Bentleys

Technical Program

Day 2 Thursday, 11 August 2022 continued

Time	Session	Presenters
4:15–4:45pm	Session 7: Keynote address	Andrea Michaels MP
4:45–6:45pm	Free time	
6:45pm	Bus departs for dinner	
7:00–10:30pm	“Back to the Future” Convention Dinner	
10:30pm	Bus departs for Novotel Barossa Valley Resort	

The Back to the Future – Convention Dinner

Join your colleagues at the *Back to the Future* themed dinner for an enjoyable evening of networking and entertainment.

The dress code is cocktail, and attendees are encouraged to let your imagination run wild as we follow Doc Emmett and Marty’s adventures in time as they visit 1985, 1955 and 1885!

Rock and roll back into the 1950s or take a nostalgic boogie through the 80s – big hair not your thing? Channel your inner John Wayne and take a ride back into 1885 and the wild west!

Date: Thursday, 11 August 2022
Time: 7:30pm–10:30pm
Venue: Chateau Tanunda
Transport: Bus transfer
Price: Included for full registration delegates (limited availability)
$175.00 for additional tickets – see registration form for details
Dress: Cocktail or channel the “Back to the Future” theme

Technical Program

Day 3 Friday, 12 August 2022

Time	Session	Presenters
8:45–9:30am	**Tax Policy & Advocacy update**	**Julie Abdalla, FTI** The Tax Institute **Robyn Jacobson, CTA** The Tax Institute
9:30–10:30am	**Session 8: Back (dated) to the future** Advisors are often faced with issues arising from clients not documenting decisions and transactions in real time. If you are Marty McFly, you can just hop in your time travelling DeLorean and go back and fix the problem! Unfortunately, we don't have that option. So what can be done instead? In this session we will discuss common issues that arise in relation to documentation including: • Back dating – is it ever ok and what is the effect? • Documenting after the fact – acknowledgments, confirmations and ratifications • 'Effective dates' of documents • Minutes of meeting – is there a time limit on recording a resolution after it is made? • Future dating documents and the impact of s41AA of the Law of Property Act (SA) • The ability to make elections or choices for tax purposes after an event that have a 'back dated' effect • Statutory record keeping requirements	**Briony Hutchens, CTA** DW Fox Tucker Lawyers
10:30–11:00am	**Morning Tea**	
11:00am–12:00pm	**Session 9: Cryptocurrencies, NFTs, DeFi and the future of blockchain** *"I Guess You Guys Aren't Ready For That Yet. But your kids are gonna love it"* As the world of blockchain continues to evolve beyond cryptocurrencies, tax authorities and practitioners are continually challenged by having to apply traditional tax principles to the decentralised world. Recent examples include "Decentralised finance" (DeFi) transactions and "non-fungible tokens" (NFTs). After an overview of the taxation of cryptocurrencies in Australia, this session will explore the key issues challenging this space including tracking cryptocurrency gains and losses, chain splits, token staking and wrapping transactions, the taxation of NFTs and the nature of a DAO for tax purposes. In the final part of the session we'll explore some charitable aspects of the blockchain industry including donating cryptocurrency and income tax exemptions available to blockchain businesses.	**Will Fennell** Piper Alderman

Technical Program

Day 3 Friday, 12 August 2022 continued

Time	Session	Presenters
12:00 – 1:00pm	**Session 10: Determining employment status, a matter for judges or parliament?** Is the High Court 's new approach to identifying employees taking us back to the future? The panel will discuss the concept of employee versus contractor in light of the recent High Court decisions in Personnel Contracting and ZG Operations. In particular on labour recruitment decisions and the unresolved impact on questions in relation to superannuation guarantee contributions. The panel will also consider the prospect of regulatory reform on the statutory definition of employee and the application to income tax, superannuation, payroll tax and workers' compensation. With an impending Federal election at the time of publication of this brochure and a recent state change to a Labor government, the idea of a statutory definition may or may not be on the table.	**Suzanne MacKenzie, CTA** Bar Chambers **Prof. Andrew Stewart** University of Adelaide and Piper Alderman
1:00 – 2:00pm	**Lunch**	
2:00 – 3:00pm	**Session 11: International expansion for SMEs** In a COVID normal world, SMEs are looking at offshore expansion to improve business efficiency, reduce overhead costs and enjoy lower tax rates. Setting up the right structure at the right time is critical to achieving efficient tax outcomes and minimising compliance headaches with both the Australian and foreign tax authorities. This session will cover the common issues associated with expanding offshore, including: • Exploration – identifying the key tax issues of expanding offshore • Establishment – setting up the right structure • Operations – efficiently operating with the structure and repatriating profits to Australia • Exit – selling / winding up the foreign business	**Phil Shepherd, CTA** KPMG **Angelica Caruso** KPMG
3:00 – 3:30pm	**Afternoon tea**	
3:30 – 4:30pm	**Session 12: Tax litigation and disputes – what we can learn from the past** Taxpayers who head down the litigation path, without adequate preparation or understanding of the processes involved, can find themselves on the back foot when challenging decisions before the AAT or Federal Court. Fortunately, taxpayers don't need the benefit of time travel to learn some important lessons in preparing their cases for litigation. This session focusses on key areas that taxpayers and their advisers should turn their minds to, including: • Standing and grounds of appeal • Information gathering powers & LPP • Time limits on assessments • Burden of proof • Model litigant issues • Debt recovery • Recent cases	**Jessica Pengelly, CTA** HWL Ebsworth Lawyers
4:30pm	**Closing Address**	

Presenters

Julie Abdalla, FTI, is Tax Counsel, Tax Policy and Advocacy, at The Tax Institute. Julie has practiced in the corporate tax teams of Big 4 and top tier law firms in Sydney and Melbourne. She has expertise in corporate and individual tax matters with a strong international tax focus. Prior to joining The Tax Institute, Julie gained experience across the spectrum of UK taxes while working at an international law firm in London. Julie has a strong passion for tax policy and reform, and the depth of knowledge to advocate for members. Julie has been recognised among her peers and throughout the profession for her leadership and excellence in tax. She has been awarded a number of scholarships and awards including the International Bar Association Taxes Committee Scholarship, the Australian Lawyers Weekly 30 Under 30 Award in Tax, and a prize from the University of Oxford. Julie holds a Bachelor of Arts and a Juris Doctor from the University of Sydney, and a Master of Laws from the University of Melbourne, part of which was completed at the University of Oxford.

Arthur Athanasiou, CTA-Life, is a partner at Thomson Geer. Arthur's main area of practice is dispute resolution, particularly in the SME sector, with the ATO, TPB and the SRO. Arthur has many years' experience in complex tax audit, negotiations, settlements and tax litigation. He also has broad experience in the taxation of SME entities, with an emphasis on Division 7A and high wealth individuals and family groups. Arthur is an associate professor at La Trobe University Law School. He has qualified as a Chartered Accountant, is a former President of The Tax Institute, chaired the Law Institute's Tax Law Advisory Committee and now serves on the Industry Advisory Board of the IPA-Deakin University SME Research Centre. Arthur is an Accredited Tax Law Specialist, is a widely published writer on taxation issues and regularly appears in the mainstream media.

Angelica Caruso is an Assistant Manager in the KPMG Adelaide Corporate Tax team. Angelica holds a Bachelor of Commerce (Accounting) and a Bachelor of Laws with the University of Adelaide. Angelica is a Provisional Member of the Institute of Chartered Accountants and a Chartered Tax Adviser with the Taxation Institute of Australia. Angelica has experience working primarily in corporate tax compliance and advisory. Angelica has worked with a diverse range of clients in financial services, property and primary production industries.

Mark D'Angelica, FTI, has over 13 years' experience in providing advice on all areas of State and Federal tax, including corporate tax, international tax, tax effect accounting, PRRT, GST, employment taxes, transfer pricing, R&D tax incentive, payroll tax, state royalties and stamp duty. He was the Tax Manager of Beach Energy for 8 years and was key figure in the implementation of new financial reporting systems, mergers and acquisitions, providing strategic tax ad-vice, implementing tax governance framework and liaising with the ATO and AusIndustry. He was also a key tax advisor of the 2 biggest M&A deals in South Australia in 2016 and 2017.

Fiona Dillon, CTA, is the Chief Tax Counsel at the ATO. In this role, Fiona leads the resolution of the ATO's most significant tax technical issues. Working predominantly in technical roles prior to this, Fiona has helped shape the strategic direction of the ATO's Public Advice and Guidance, was a longstanding member of the ATO's Public Ruling Panel and a member of the ATO's General anti-avoidance rule Panel; as well as spending a number of years in private practice. For almost two years Fiona served as Minister-Counsellor (Taxation) in the Australian delegation to the OECD based in Paris. In that role, she chaired the Joint International Taskforce on Information Sharing and Collaboration (JITSIC) on behalf of the Commissioner and represented Australia in other OECD taxation initiatives. Fiona is an admitted Australian legal tax practitioner and holds a Bachelor of Commerce, Bachelor of Laws with Honours and a Master of Taxation. In 2019, in its recognition of 100 years of woman in tax, IFA named Fiona in its 68-leading woman in international tax globally.

Will Fennell is a taxation specialist at Piper Alderman who provides state, federal and international taxation advice to a range of corporate, commercial and private clients. Much of Will's work involves the provision of specialist taxation advice in the context of corporate restructures, business sale transactions and private client advisory. Will also advises the charities sector in relation to a range of taxation and governance issues. In addition to advisory work, Will also manages disputes with state and federal taxation authorities, and has an excellent track record in securing positive outcomes for his clients. Will's knowledge and expertise is well recognised both internally and externally. Will regularly authors taxation law updates and has presented papers on a number of occasions at The Tax Institute. Will has also completed a Master of Tax at Melbourne University. He also has a depth of expertise in the not-for-profit sector advising NFPs on a range of issues including restructuring, tax endorsement and compliance, and directors' duties.

Presenters

Briony Hutchens, CTA, is a Director in DW Fox Tucker's specialist Tax team, acting on behalf of a wide range of clients on matters ranging from one-off, large and complex matters to those encountered on a daily basis. She advises on most areas of state and federal taxes including business structuring issues; state taxes, including stamp duty, land tax and payroll tax; taxation disputes (state and federal); trusts; self-managed superannuation funds; property and joint venture projects; estate and succession planning and all aspects of commercial transactions. Briony is a Chartered Tax Adviser and holds a Master of Taxation (UNSW). She is recognised in Best Lawyers Australia for her expertise in both Wealth Management & Succession Planning and Trusts & Estates, and was awarded 2022 Lawyer of the Year by Best Lawyers Australia for Wealth Management & Succession Planning.

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She has nearly three decades in the profession, including a public practice background which preceded her various training roles over 23 years. Robyn continues to be a regular conference and webinar presenter, and is an avid advocate, social media commentator, columnist, blogger and podcaster. She is also regularly quoted in the media. Robyn is a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. She regularly consults with The Treasury, ATO and professional bodies including as a member of the ATO's Tax Practitioner Stewardship Group. Robyn was recognised in the Women In Finance Awards 2019 as the Winner of Thought Leader of the Year and was named in the global Top 50 Women in Accounting 2019. She was also recognised in the Australian Accounting Awards 2020 as the Winner of both Thought Leader of the Year and the Accountants Daily Excellence Award.

Suzanne MacKenzie is a Barrister specialising in financial services, superannuation, trusts and equity, taxation and general corporate and commercial matters work. Suzanne has a great depth of knowledge and experience in superannuation law and takes a keen interest in the latest changes and trends affecting the industry – having done so for more than 30 years. She acts for trustees of large industry and retail funds as well as public sector funds and also regularly acts in relation to smaller individual claims and matters affecting SMSFs.

Presenters

Sonia Mascolo, CTA, is a Tax Partner at Bentleys in Adelaide. Sonia advises clients in a wide variety of areas including tax technical business / structuring advice, succession planning and wealth management strategies, international tax issues, indirect tax and state taxes. She has tax experience working in the legal profession, the ATO, a big four firm as well as university lecturing and tutoring positions. Sonia joined TTI in 2012 and is a current member of the SA Technical Committee.

Andrea Michaels is the South Australian Minister for Small and Family Business, Consumer and Business Affairs, and Arts. She is also the State Member for Enfield, representing the community in Adelaide's inner North and North-Eastern suburbs. Andrea's family fled war-torn Cyprus in 1974, landing in South Australia in 1976 when she was just 11 months old with nothing but the clothes on their backs. Through her parents' hard work, commitment to family and dedication to their community, Andrea was instilled with a passion for community service. She is now the proud mother of two boys, Sebastian and Charlie, and is keen to ensure that they and their peers are also provided with ample opportunities in a strong, diverse and thriving community. Prior to becoming a Minister, Andrea was running her own small business – a legal practice specialising in commercial law and supporting small and family businesses. She has also been Treasurer of the Law Society of SA, a company director, and a partner at industry leading law firms, as well as a chartered tax advisor and accredited family business advisor. Andrea is passionate about promoting diversity, supporting more women to launch and grow businesses, and building safe, fair and friendly communities. She is focused on ensuring the Government is easy to do business with, that small businesses are supported to succeed, and that the whole community has access to a thriving cultural and creative sector. Andrea is also committed to being a strong voice for the people of Enfield.

Jessica Pengelly, CTA, is a Special Counsel in HWL Ebsworth's Tax Group in Adelaide. Jessica has over 10 years' experience in tax and revenue law, and practices across a broad range of taxation and revenue law areas including income tax, capital gains tax (CGT), GST, Wine Equalisation Tax (WET), excise, stamp duty, payroll tax and land tax. She has a particular interest in international tax, corporate transactions, small business taxation, indirect taxes and dispute resolution. Jessica's recent work includes advising in relation to complex income tax litigation and dispute resolution involving high net worth individuals and small businesses. Prior to joining HWL Ebsworth, Jessica worked for the ATO and was part of the ATO's Tax Counsel Network.

Presenters

Phil Shepherd, CTA, is a Director at KPMG and a tax specialist working primarily with middle market corporates and large family groups. With over 13 years of experience providing tax advice to domestic and international groups, Phil has a passion for seeing global businesses thrive in South Australia. Phil has a broad skillset which includes advising significant global entities on tax risk management, structuring private groups for divestment or IPO and developing succession and estate planning strategies for high net worth families. Phil is a Chartered Tax Advisor and winner of the 2021, SME Tax Advisor of the Year Award.

Peter Slegers, CTA, heads Cowell Clarke's Tax & Revenue, Superannuation and Private Client practice groups. Peter advises and acts for a wide range of public and private companies and high net worth individuals. Peter's areas of expertise include: income tax (as it impacts on business and high net worth clients); capital gains tax; goods and services tax; state taxes; trust law and superannuation law. Peter has published numerous papers on trust structures and has considerable experience in this area. Peter is also regularly involved in advising SMSF trustees and is a co-author of the Tax Institute's SMSF Income Stream Guide.

Prof. Andrew Stewart is the John Bray Professor of Law at the University of Adelaide. His main interests lie in employment law and workplace relations, contract law and intellectual property. His most recent publications include new editions of Creighton and Stewart's Labour Law, Stewart's Guide to Employment Law and Intellectual Property in Australia. He is part of several teams awarded Australian Research Council funding, including Discovery Grants to examine the regulation of post-secondary work experience and the organisation of work through digital platforms, and a Linkage Grant to study the role of industrial tribunals in facilitating workplace cooperation. Besides working as a consultant with the national law firm Piper Alderman, Andrew has provided expert advice to the International Labour Organisation, to Federal and State governments in Australia and to a wide range of other organisations. His recent work has included major reports commissioned by the Fair Work Ombudsman and the Department of Employment on unpaid internships, and by the Fair Work Commission on equal remuneration claims. Prior to that, he advised the Australian government on the drafting and structure of the Fair Work legislation.

Julie Van der Velde, CTA, is the principal of a specialised commercial law firm, VdV Legal, and has degrees in Business and in Law and a Masters of Taxation Law. With over 20 years' experience advising Australian businesses, her practice focuses on taxation and trust law with an emphasis on business structuring, tax planning, business succession and intergenerational transfers. Julie is The Tax Institute's SME Chartered Tax Adviser for 2017 and is regularly listed as a recommended tax lawyer and a recommended Wills, Estates and Succession Planning lawyer in Doyle's Guide.

Yan Wong, ATI, is a tax partner at Grant Thornton with over 27 years' corporate and international tax experience as a Chartered Accountant and practising tax lawyer. Yan delivers strong client service and commercially focused taxation advice to his clients particularly in the Food and Beverage and Professional Services sectors. He provides a versatile set of skills and experience in international tax/cross border tax advice, tax compliance and tax transaction/due diligence services.

Venue and accommodation

Novotel Barossa Valley Resort

42 Pioneer Avenue, Rowland Flat, Barossa Valley

The Novotel Barossa Valley Resort located in the Barossa Valley district, is set in a natural amphitheatre overlooking Jacob's Creek. The guest rooms all feature private balconies and views of the Barossa Ranges. Both comfort and functionality are assured with iPod docking stations, connecting directly to 32-inch LCD TVs, pay TV channels, in-house movies, comfortable workstations, including ergonomic chairs and broadband access, a large chaise lounge to stretch out on and individually controlled air-conditioning.

An accommodation block has been reserved for delegates at the Novotel Barossa Valley Resort. Favourable room rates have been negotiated and room rates are quoted on a per-person, per-night basis (inclusive of GST) and include breakfast.

These favourable room rates have been extended from Tuesday (9 August) to Saturday (13 August).

Rooms are limited and must be booked prior to 12 July 2022. All accommodation bookings must be made directly with the venue via the self-book weblink here.

For alternative accommodation arrangements, please contact the Barossa Wine and Tourism Association on 1300 852 982 or visit the website www.barossa.com.

Getting to the Novotel Barossa Valley Resort

The resort is located at 42 Pioneer Avenue, Rowland Flat, Barossa Valley. It is 85 kilometres (75-minute drive) from the Adelaide CBD and Adelaide Airport. The venue provides free on-site parking for guests. Car hire is readily available at Adelaide Airport and we encourage you to book when registering for this event.

Venue and accommodation

Endota Spa

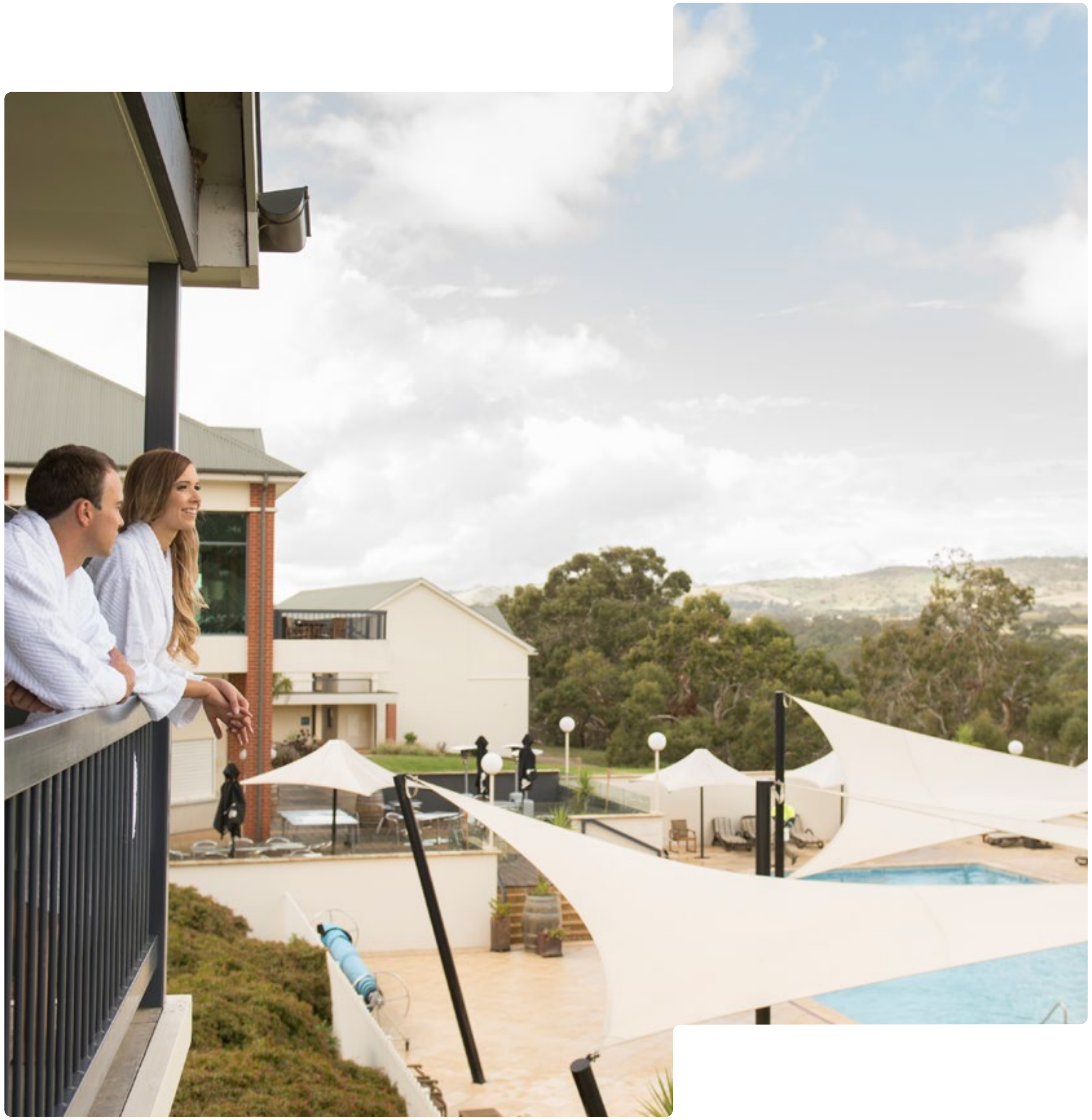
Immerse yourself in down-to-earth pampering at the Novotel Barossa Valley Resort's own Endota Spa. Offering unparalleled relaxation, indulge in a range of spa experiences for your body, face, soul and mind, just a stone's throw away from your room. Bookings in advance on 08 8524 0071 or barossavalley@endota.com.au are recommended to avoid disappointment.

Golf at the Tanunda Pines Clubhouse

Golf at the Tanunda Pines Clubhouse is just a two-minute stroll from the resort. This world-class golf course is a stunning 18-hole, par-72 course with 100-year-old gum trees lining fairways that undulate across the hilltops of the Barossa Ranges and it just a two-minute stroll from the resort. It is available either pre, during or post-convention. Contact the club direct on 08 8563 1200 to make your individual or group booking, with golf clubs and motorised golf carts available for hire. Bookings in advance are recommended to avoid any disappointment.

The Tasting Room

For those that are unable to go out and visit one of the 170 wineries in the Barossa, we will bring the Barossa to you! The Tasting Room offers complimentary wine tasting featuring a different winery every Thursday, Friday and Saturday. A wide range of wonderful Barossa products are also available for purchase at any time.



Event information

Registration inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Conference lunches	Convention Welcome reception and gala dinner*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓

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

Welcome Reception | Wednesday, 10 August 2022

The Welcome Reception is included in the registration fee for delegates attending the full Convention. The Welcome Reception includes stand up dinner and drinks. Join us for an evening of networking and a showcase of Barossa's best food and wine.

Convention Dinner | "Back to the Future" Thursday, 11 August 2022

This year's Convention dinner will take place among the majestic bluestone winery and vineyards of Chateau Tanunda. Don't miss the chance to network with your colleagues, whilst enjoying great food, wine and entertainment.

The dress code is cocktail. However, delegates are encouraged to embrace the theme and let your imagination run wild as we follow Doc Emmett and Marty's adventures in time as they visit 1985, 1955 and 1885!

Rock and roll back into the 1950s or take a nostalgic boogie back to the 80s. Big hair not your thing? Channel your inner John Wayne and take a ride back into 1885 and the wild west!

Registration inclusions

Full convention registration includes participation in the full technical program, electronic access to all available materials via the Barossa Convention Attendee Hub, attendance at the Wednesday Welcome Reception and Thursday Gala Dinner and all refreshments during convention hours. Registration fees do not include travel, accommodation, or hotel incidentals.

Early bird registration

All registrations received and paid for in full by 11 July 2022 are entitled to the early bird rate.

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.

Confirmation of registration

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

The 2022 Barossa Convention Attendee Hub

The registration fee includes electronic access for delegates to download all available presenter materials and event information prior to the event. The 2022 Barossa Convention Attendee hub will contain session and presenter information, event materials, sponsor offers and other relevant event information. Email notifications will be sent to all registrants in the weeks prior to the convention.

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.

Event information

CPD accreditation

Attendance at the convention counts for 12 hours Continuing Professional Development Accreditation with The Tax Institute.

Business Alliance Partners

Our Business Alliance Partners will be on hand throughout the convention, and we invite you to discover how their various products and services can be of benefit. For your chance to win one of many exciting prizes, ensure you drop your business card at registration which will be drawn during the Friday afternoon sessions.

Dress code

Business casual attire is suitable for the duration of the convention program. For Thursday's convention dinner, cocktail or themed attire is appropriate (refer 'Convention Gala Dinner' on page 6 for more information).

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.

Wi-Fi

Internet access will be available for convention delegates using a dedicated access code. This will be provided to delegates at the event. Wi-Fi is accessible in the function foyer and conference rooms from 5.00pm Wednesday, 10 August to 5.00pm Friday, 12 August 2022.

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 in person 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 Organization and relevant State authorities. To see The Tax Institute's full COVID-19 Event Guidelines, click here.

Event information

Cancellation Policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should an in-person 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 an in-person 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: www.taxinstitute.com.au/privacypolicy.

The Tax Institute

Barossa Convention
Registration Form

42749 | WD

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 | 42749

	Member	New member*	Non-member
Early bird registration Received on or before 11 July 2022	☐ $1,600	☐ $1,940	☐ $1,900
Standard registration Received after 11 July 2022	☐ $1,800	☐ $2,140	☐ $2,100

☐ 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.

Welcome Reception | Wednesday, 10 August 2022 | 42831

☐ Yes, I WILL be attending the Welcome Reception OR

☐ No, I WILL NOT be attending the Welcome Reception

☐ Yes, I require additional tickets for the Welcome Reception at $80 per person (42832)

No. x tickets at $80 each: $

Back to the Future Convention Dinner | Thursday, 11 August 2022 | 42829

☐ Yes, I WILL be attending the Back to the Future Gala Dinner OR

☐ No, I WILL NOT be attending the Back to the Future Gala Dinner

☐ Yes, I require additional tickets for the Back to the Future Gala dinner at $175 per person (42830)

No. x tickets at $175 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: DD/MM/YYYY

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.

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: DD/MM/YYYY

22-023EVT_05/22

3 Accommodation

An accommodation block has been reserved for delegates at the Novotel Barossa Valley Resort.

Favourable room rates have been negotiated and room rates are quoted on a per-person, per-night basis (inclusive of GST) and include breakfast.

All accommodation bookings must be made directly with the venue via the self-book weblink, here.

Rooms are limited and must be booked prior to 12 July 2022.

4 Payment summary

Registration fees	$
Additional guest tickets – Welcome Reception ($80 each)	$
Additional guest tickets – Back to the Future Gala Dinner ($175 each)	$
Total payable	$

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:

Card no.: Expiry date: MM/YY

Cardholder's signature:

For our refund, cancellation and replacement policy visit 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

For registration enquiries, please contact customeradmin@taxinstitute.com.au

To register **Email** customeradmin@taxinstitute.com.au **Mail** L37, 100 Miller Street North Sydney NSW 2060 **Online** taxinstitute.com.au/BarossaConvention

22-023EVT_05/22

Thank you.

The Tax Institute gratefully acknowledges the generous assistance of members of the 2022 Barossa Convention Organising Committee:

Will Fennell, Chair, Barossa Convention Organising Committee

Leo Efthivoulou, CTA, ENA Law

Melissa Harrison, Australian Taxation Office

George Hodson, CTA, Thomson Geer Lawyers

Neil Oakes, CTA, Perks

Tom Paltridge, CTA, Grant Thornton

Jessica Pengelly, HWL Ebsworth Lawyers

Nicole Peterson, CTA, PKF Adelaide

Nick Wilkins, CTA, Wilkins Advisory

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