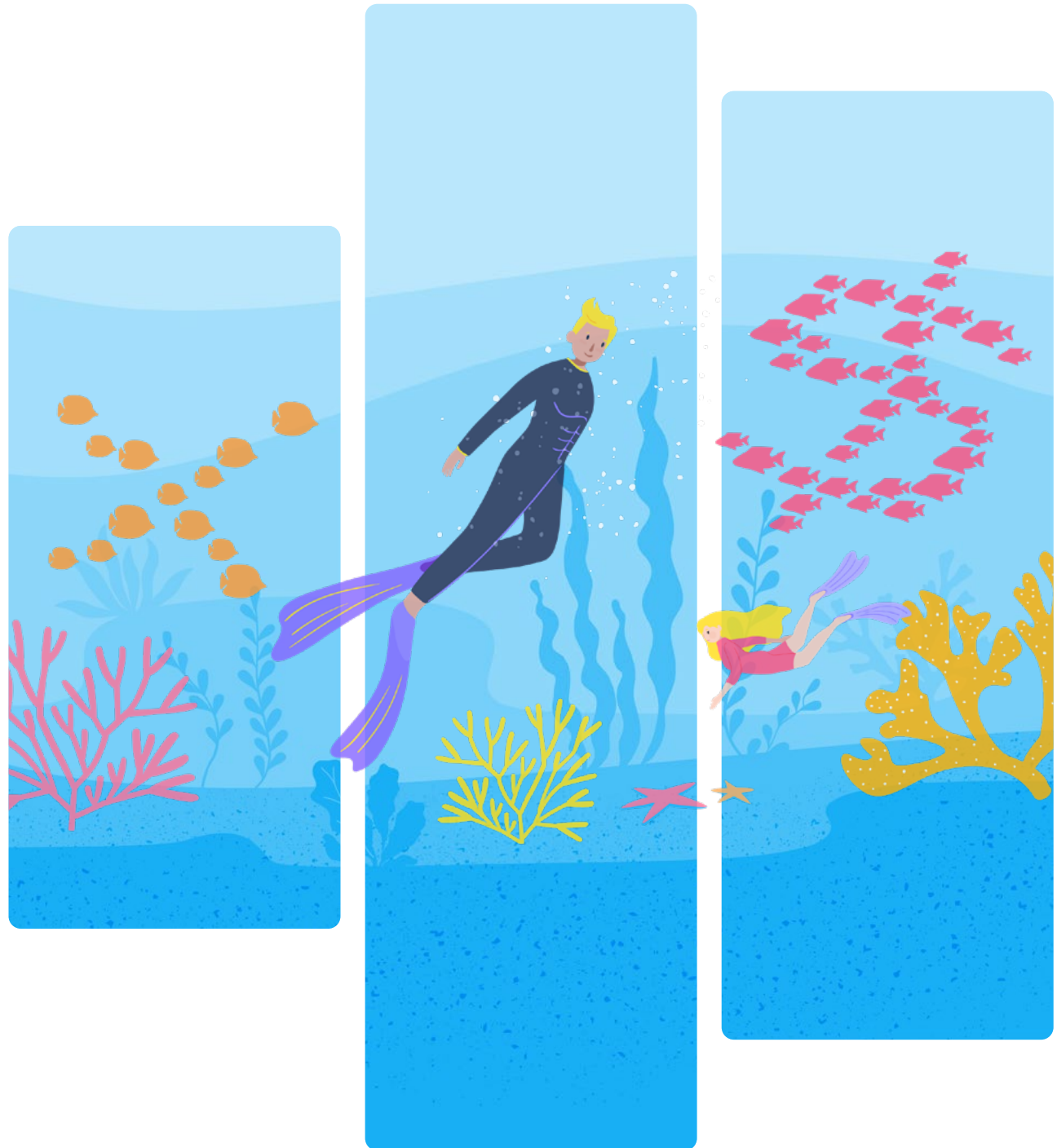


# Noosa Tax Convention

**16–18 November 2022**

**Sofitel Noosa Pacific**

**12 CPD hours**



# Welcome

## *Moving forward through continuing disruption*

Recent years have reinforced the need for all of us, governments, businesses and individuals alike, to be agile. However, the world hasn't stopped, and we are now adapting to a world where disruption has become the norm.

This year's Noosa Tax Convention, our 30th, is focussing on the issues that tax practitioners are now facing within their own businesses and also those impacting their clients, ensuring we are equipped to deal with disruptions as they arise.

The program will help you identify and address key issues in a range of high-quality technical sessions and interactive practical workshops. There are also a number of social activities that will provide great opportunities for fun and relaxation while you connect with other tax professionals.

When planning this year's program, we, and the Organising Committee, reflected on the impact of the events of recent years on practitioners and our clients and what the future looks like.

As always, the presenters on the program are outstanding, and will provide their insights in relation to a range of topics including dealing with the new working environment, preparing businesses for change, and managing the disruptions (s100A and others) to trust structures. The interactive workshops will then allow attendees to explore with robust discussion, the practical implications that we are seeing in practice.

The program will open with a facilitated workshop addressing how to deal with some of the key tax risks facing businesses by improving internal tax governance.

The final panel session facilitated by Robyn Jacobson, will also include Fiona Dillon discussing the ATO's key focus areas and technical issues that may have been raised during the event.

The event is always popular and sells out so please register early to guarantee your spot. We look forward to seeing you there.



**Kim Reynolds, CTA**  
Co-chair, Noosa Tax Convention  
Organising Committee



**Emma Woolley, CTA**  
Co-chair, Noosa Tax Convention  
Organising Committee

**Early bird offer**

**Register on or before Friday, 21 October to save!**

# Technical Program

**Day 1**      Wednesday, 16 November 2022

Time	Session
2:00 – 2:30pm	Registration
2:30 – 4:00pm	<p><b>Workshop 1: Case Study – Tax Governance – getting it right</b> Workshop Coordinators: Belinda Cheesewright, CTA, KPMG; Maddi Hatt, KPMG</p> <p>With the ATO’s increased focus on tax governance for all taxpayers, it is increasingly important for businesses to demonstrate their tax transparency and understanding of the reasons behind the adoption of tax positions.</p> <p>This workshop will run through a practical framework approach and documentation requirements for SME’s looking to understand and improve their approach to tax governance.</p>
4:00 – 5:30pm	<p><b>Sunset Social Activity</b> Stretch your legs after Workshop 1 by taking a walk to Little Cove or Laguna Beach. If relaxing is more your style, visit Sofitel’s luxurious AQUA Day Spa to unwind.</p>
5:30 – 7:00pm	Delegate Free Time
7:00 – 9:00pm	Welcome Reception



## Welcome Reception

Join your colleagues, peers and our esteemed presenters for an evening of drinks and networking.

Drinks will be served poolside at the Sofitel Noosa Pacific Resort from 7.00pm on Wednesday, 16 November.

We hope you will join us for an enjoyable evening.

**Date:** Wednesday, 16 November 2022

**Time:** 7:00–9:00pm

**Venue:** Poolside, Sofitel Noosa Pacific

**Price:** Inclusive for all full registration delegates

**Dress:** Business casual

# Technical Program

**Day 2**      Thursday, 17 November 2022

Time	Session
7:45 – 8:15am	<b>Registration</b> Welcome and Opening Address
8:15 – 8:30am	<b>President’s Address</b> Jerome Tse, CTA, The Tax Institute
8:30 – 9:30am	<b>Session 1: A New Working Environment (Animal Farm?) – the worker’s world</b> Speaker: To be announced  In the third year of a post-Covid world, Australia is struggling with skills shortages, the great resignation and the challenges of employee engagement. It is also becoming more common for employers to offer additional and novel benefits to keep up with increased expectations.  In an employee’s market, business owners and their advisors need to be abreast of the legislative requirements and entitlements of their workers, to retain staff and drive business performance. This session will cover the key tax concerns from a practical perspective including: <ul style="list-style-type: none"><li>• Recent developments in the employee v contractor landscape</li><li>• Implications for income tax obligations, superannuation, payroll tax</li><li>• Employee benefits and FBT considerations in a post-Covid world</li><li>• Other considerations to be aware of – workplace law, unfair dismissal claims and what’s changed in the working environment</li></ul>
9:30 – 10:30am	<b>Session 2: Challenges of the New Working Environment – attracting and retaining top talent</b> Speaker: Melinda Peters, CTA, McCullough Robertson  One of the challenges facing businesses in the current environment is retaining talent. One way of retaining and motivating employees is to bring them into the business. In fact, the employees may be your client’s exit strategy. This session will focus on: <ul style="list-style-type: none"><li>• Issues to consider when bringing employees into the business, including entry price and funding of entry</li><li>• Structuring alternatives to bring employees in, including issue of shares, transfers of shares and non-equity plans</li><li>• Taxation implications for the employee, including employee share schemes and start up concessions</li><li>• Capital gains implications for the existing shareholders including small business CGT concessions and value shifting</li><li>• Shareholder agreement considerations including terminating/trigger events and the importance of drag along clauses, and</li><li>• Regulatory requirements associated with the offer of equity to employees</li></ul>
10:30 – 11:00am	<b>Morning Tea</b>

# Technical Program

## Day 2 Thursday, 17 November 2022 continued

Time	Session
11:00am-12:00pm	<p><b>Session 3: Future horizons – What a client needs to be aware of in the new working environment</b> Speaker: Andy Milidoni, CTA, Johnson Winter &amp; Slattery</p> <p>What has changed in business since the COVID world began and what do we see as future problems business face from the perspective of the various powers the Commissioner has in relation to recover of tax debt under the Income Tax Administration Act.</p> <p>What does the not so distant future bring for the Commissioner’s ability to use the following tools to recover debt, what are we seeing now and expect to see more of, practical scenarios in floundering businesses with an inability to pay tax debt:</p> <ul style="list-style-type: none"><li>• ATO Garnishee notices and what this means for personal liability for directors and strategies that need to be put in place now to address the risk of DPNs being issues and the availability of remedies (including liquidation);</li><li>• Disclosure of business tax debts by the ATO to third party credit reporting agencies, and</li><li>• Legal recovery actions</li></ul>
12:00-1:00pm	<p><b>Session 4: Passing the baton (not the tax issues)</b> Speaker: Michelle Hartman, CTA, PwC</p> <p>Many private and family-owned businesses will transition to next generation ownership or be sold in the next few years. Effective succession planning is a complex process that raises many potentially difficult issues, including tax. While the plan may not trigger immediate tax consequences, a well-thought out plan should assist in avoiding any unintended consequences when the plan is implemented.</p> <p>This session will focus on:</p> <ul style="list-style-type: none"><li>• Change of control – now vs later, and how will the successor obtain control. The availability of tax concessions, impact on pre-CGT assets, availability of tax losses</li><li>• Consideration for the transfer – market value substitution rules, CGT value-shifting, buy-sell agreements, use of insurance to fund a buy-out, funding issues (ie Div7A, debt forgiveness)</li><li>• Restructures to facilitate transfer of assets or operations, including share-buy backs, dividend stripping</li><li>• Other strategies to facilitate the plan, including use of option agreements, lease or licence of business assets.</li></ul>
1:00-2:00pm	Lunch

# Technical Program

**Day 2** Thursday, 17 November 2022 *continued*

Time	Session
2:00–3:30pm	<p><b>Workshop 2: Arming the business to overcome challenges</b> Workshop Coordinator: Rachel Vijayaraj, CTA Brown Wright Stein Lawyers</p> <p>Workshop Leaders: Tracey Dunn; Lachlan Smithers, ATI, Johnson Winter &amp; Slattery; John Middleton, CTA, Australian Taxation Office; Mariana von Lucken, CTA, HLB Mann Judd; Dung Lam, CTA, West Garbutt; Marcus Polovineo, HLB Mann Judd</p> <p>This workshop will consider a case study building on the current challenges faced by businesses:</p> <ul style="list-style-type: none"><li>• The importance of what is written in the contract for employees and contractors</li><li>• Structuring strategies to retain employee key talent</li><li>• Legal and tax considerations where employee shareholders exit</li><li>• Managing tax debt of the business</li><li>• The concerns where tax compliance obligations are neglected</li><li>• What to do when the ATO takes action to recover debt</li></ul>
3:30–4:00pm	Afternoon Tea



# Technical Program

**Day 2** Thursday, 17 November 2022 continued

Time	Session
4:00 – 5:00pm	<p><b>Session 5: Embracing a digital future: engaging emerging generations</b> Speaker: Claire Madden, Next Gen Expert</p> <p>For Generation Z, digital is their default; to learn information they ‘just Google it’, Siri is their homework companion, and many of their waking hours are spent consuming and contributing to online social media platforms. With the rise of AI and increased automation, expectations of customers and employees continue to accelerate, demanding increased personalisation, frictionless transactions, instant responses, and the seamless integration of offline experiences and online platforms. The prolific use of technology platforms has shaped Gen Z’s expectations and approaches to communication, leadership, learning and work. Bridging the generation gaps accentuated by fast changing technologies is a complex and confronting reality facing many managers and leaders as they shape organisations and teams that comprise Baby Boomers through to Gen X, Gen Y and increasingly Gen Z.</p> <p>In this session, Claire will unpack how organisations must embrace digital to be agile, adaptive and innovative in these times to remain relevant and engage the changing employee and consumer base.</p>
5:00 – 7:00pm	<b>Delegate Free Time</b>
7:00pm	<b>Official Convention Dinner</b>



## Official Convention Dinner

**Date:** Thursday, 17 November 2022

**Time:** 7:00pm onwards

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

**Dress:** Business casual

# Technical Program

## Day 3 Friday, 18 November 2022

Time	Session
8:30 – 9:00am	<b>Tax Policy &amp; Advocacy Update</b>
9:00 – 10:00am	<b>Session 6: Trusts 100A – What’s different now from the [Division 7A]/100A perspective</b> <b>Speaker: Frank Hinoporos, CTA, Hall &amp; Wilcox</b>  With the long-awaited release of the ATO’s draft guidance, including TR2022/D1, TD 2022/D1, TA 2022/1 and PCG 2022/D1, which outlines their position on arrangements that will be within the scope of 100A, many practitioners are rightly concerned on what this practically means for taxpayers and their clients. This session will take a deep dive into the ATOs guidance, the implications of recent cases and the practical implications for practitioners, including the following: <ul style="list-style-type: none"><li>• Based on the ATOs guidance, what type of arrangements are likely to trigger 100A</li><li>• Where does the decision in Guardian AIT v CoT leave us in terms of ordinary family or commercial dealings</li><li>• What practical steps should practitioners be taking to ensure their clients are managing any high risk arrangements</li><li>• Real life examples of where we are seeing the ATO apply the PCG in practice</li></ul>
10:00 – 11:00am	<b>Session 7: Dealing with internal and external disruptions to your trust structure</b> <b>Speaker: Denise Honey, CTA, Pitcher Partners</b>  Although in recent times, the focus on trust structures has centred around the application of s100A, we can’t lose sight of the many other tax issues impacting trusts. This session will discuss the top 10 issues that should be considered when dealing with trust structures in a privately held group and how to determine the tax residency of a trust [may also briefly touch on where tax residency may differ for each jurisdiction] including: <ul style="list-style-type: none"><li>• Implications for resident beneficiaries when a trust becomes a non-resident</li><li>• What happens if a trust has cross-border activities or beneficiaries? [incl Practical issues dealing with the transferor trust rules and treaty constraints]</li><li>• Passing control of family trusts to the next generation [FTE’s]</li><li>• Meaning of “income of the trust estate” (TR 2012/D1 and protocols for making trust distributions</li><li>• What are the dangers when trying to wind up a trust?</li></ul>
11:00 – 11:30am	<b>Morning Tea</b>



# Technical Program

## Day 3 Friday, 18 November 2022 continued

Time	Session
11:30am-1:00pm	<p><b>Workshop 3: Succession planning and family trusts</b> Workshop coordinator: Jacqui Reeves, CTA, businessDEPOT</p> <p>Workshop leaders: Tom Walrut, FTI, Cooper Grace Ward; Linda Tapiolas, CTA, Cooper Grace Ward; Raffi Tenenbaum, William Buck; Morag Ingham, CTA, Grant Thornton; Adrian Zuccarini, FTI, Australian Taxation Office</p> <p>This workshop will consider a case study, building on some of the key issues discussed in the plenary sessions over the past two days, including the following issues:</p> <ul style="list-style-type: none"><li>• Availability of rollovers and concessions in planning for transitioning to the next generation</li><li>• Funding considerations for family business including Div 7A and commercial debt forgiveness</li><li>• Managing 100A for taxpayers and practitioners</li><li>• Dealing with Division 7A post TD 2022/11</li><li>• Key tax issues arising from trust and changing residency [for trusts and beneficiaries]</li><li>• Day to day considerations for trusts, including meaning of trust income, trust distributions and vesting your trust</li></ul>
1:00-2:00pm	<b>Lunch</b>
2:00-3:00pm	<p><b>Session 8: Panel discussion - ATO Hot topics</b> Panellists: Fiona Dillon, CTA, Australian Taxation Office; Robyn Jacobson, CTA, The Tax Institute; Frank Hinoporos, CTA, Hall &amp; Wilcox</p> <p>In what is always one of the most anticipated sessions of this conference, Chief Tax Counsel Fiona Dillon will be addressing some of the significant tax technical issues facing privately-owned groups and their advisers, including those raised over the past two days.</p> <p>This session will be facilitated by Robyn Jacobson of The Tax Institute and will include Frank Hinoporos who will be providing his perspective and that of clients in the privately-owned groups market.</p>
3:00-4:00pm	<b>Closing drinks and networking</b>

# Presenters

**Belinda Cheesewright, CTA**, is a Tax Partner in KPMG Enterprise and has been advising on corporate and international tax and income tax issues pertaining to private groups for over 20 years. She provides strategic and commercial taxation advice to a range of clients including listed, unlisted, foreign and privately owned groups across a wide range of industry sectors to assist them in meeting their tax obligations.

**Fiona Dillon, CTA**, is the ATO's Chief Tax Counsel, accountable for the ATO's public advice and guidance, litigation, and resolving the ATO's most significant tax technical issues. Fiona previously served as Minister Counsellor (Taxation) in the Australian delegation to the OECD based in Paris and spent a number of years in private practice. Fiona is an admitted Australian legal tax practitioner and holds a Bachelor of Commerce, Bachelor of Laws with Honours and a Master of Taxation.

**Frank Hinoporos, CTA**, is a Partner in the Tax group at Hall & Wilcox. Frank has a particular focus on domestic and international tax for individuals and private groups, including the complex issues tax issues arising from international succession planning. His clients include SMEs, high net worth individuals and families and

not-for-profit entities. Frank is a member of the Law Institute of Victoria, a Chartered Tax Adviser with The Tax Institute, a Fellow of the Governance Institute of Australia and a member of the Society of Trust and Estate Practitioners (STEP).

**Denise Honey, CTA**, is an International Tax Partner/Executive Director with Pitcher Partners. She has many years of experience providing tax and structuring advice to corporate and trust groups and their key stakeholders. Denise also helps such taxpayers deal with internationally focused ATO reviews. Denise is an Accredited Tax Law Specialist with the Law Institute of Victoria, a member of the Treasury BEPS Tax Advisory Group, a member of The Tax Institute's Corporate and International Tax Committee and a regular presenter at the Institute's events.

**Morag Ingham, CTA**, is a Director in Tax at Grant Thornton Brisbane. She has worked in providing tax advisory and compliance services for over 15 years, having previously been an auditor with Grant Thornton in the UK. Morag has enjoyed working with a range of clients across a number of sectors, with a particular focus on construction and infrastructure and not-for-profit entities. She has experience in dealing

with a range of services, from day-to-day tax compliance obligations, to advising on aspects of international tax or fringe benefits tax.

**Robyn Jacobson, CTA**, is the Senior Advocate at The Tax Institute. She has nearly three decades in the profession, including a public practice background that 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 Chartered Tax Adviser of The Tax Institute, a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. She regularly consults with the Treasury, ATO and professional bodies on technical issues including as Interim Co-Chair of the ATO's Tax Practitioner Stewardship Group and a member of various other working groups. Robyn has been recognised as a Thought Leader for four consecutive years as Winner of this category at the Women In Finance Awards in 2019 and 2021, and at the Australian Accounting Awards in 2020 and 2022. Robyn was the Winner of the Accountants Daily Excellence Award in 2020 and was named in the global Top 50 Women in Accounting 2019.

**Dung Lam, CTA**, is a Principal at West Garbutt and is based in Sydney. Dung has more than 20 years of experience in advising corporates, small-to-medium enterprises, high net worth individuals, professional firms, accountants, financial planners and their clients, on a variety of taxes including income tax, capital gains tax, GST and state taxes such as duty, payroll tax and land tax. Dung also has extensive experience advising on taxation trusts, estate planning and superannuation issues in the SMSF arena. Dung is a Chartered Tax Adviser, full member of the Society of Trusts and Estate Practitioners, an accredited Specialist in Business and Personal Tax with the NSW Law Society, among others. Dung advises a broad range of clients, including corporates, small-to-medium enterprises, high net worth individuals, professional firms, accountants, financial planners and their clients.

**Mariana von Lucken, CTA**, is a Tax Partner with HLB Mann Judd, and advises a wide range of clients that need assistance on a wide range of tax topics, including R&D, early-stage innovation companies, employee shares/options for start-ups and FBT. In her commitment to give back to the tax profession, Mariana is involved with The Tax Institute's Professional Development and Women in Tax committees.

# Presenters

**John Middleton, CTA**, is part of the ATO's Tax Counsel Network, where he works on complex technical advice, tax reform projects, and strategic litigation. Prior to this, he had over 20 years in the private sector as Special Counsel at Clayton Utz Brisbane specialising in revenue and commercial law. He practised in CGT, stamp duty, GST and general tax. While in private practice he was listed in Doyle's and Best Lawyers in respect of tax matters.

**Andy Milidoni, CTA**, specialises in all aspects of revenue law as well as superannuation and trust law. He routinely advises clients in tax audits and tax disputes including the negotiation of payment arrangements and other debt management matters.

**Melinda Peters, CTA**, is a specialist tax and duty lawyer, practising in all areas of direct and indirect tax – with a particular focus on the transaction taxes, structuring and funds management. A partner in McCullough Robertson's highly regarded taxation team and a chartered tax adviser, Melinda prides herself on achieving commercial outcomes and providing practical advice to clients. In her role, Melinda acts for a range of clients, from individuals to start ups, to large corporate clients and managed funds. She advises extensively on

cross-border taxation issues and inbound and outbound investment structures, mergers and acquisitions, trusts and is experienced in advising and implementing a range of employee incentive and remuneration arrangements. She also assists clients with taxation and duty disputes and has experience in such matters before the Federal Court, AAT and Queensland Supreme Court. Melinda holds a Juris Doctor from the University of Queensland and a Masters of Taxation from the University of Sydney.

**Marcus Polovineo**, is an experienced taxation practitioner, and a Manager at HLB Mann Judd having joined them in 2011. Through broad client exposure Marcus has established extensive tax and commercial knowledge with a practical, client-based approach. He has expertise in funds management and investment entity tax issues, including assisting businesses and funds with distribution analysis and calculations as well third-party reporting and other compliance obligations. He also has experience in advice and compliance with the Australian Research & Development Tax Incentive; and assisting businesses with complex tax matters such as income recognition, transactions and tax consolidation. In 2019, Marcus was a winner of the Specialist Consultant award at the Accountant's Daily

“30 under 30” awards. He was also a finalist in the tax compliance category.

**Jacqui Reeves, CTA**, is a Senior Manager at BusinessDEPOT, a ‘one place for business’ that provides an array of professional services to the SME market. With over 13 years' experience in Public Practice and 5 years working in the ‘Big 4’, Jacqui plays a key role as business and personal tax expert to many high net worth individuals and family owned businesses. Jacqui has a passion for finding solutions to complex tax issues and enjoys working with clients to navigate the best tax outcome for their personal situation

**Lachlan Smithers, ATI**, has broad experience gained from working on complex commercial transactions and disputes. He has particular experience in Australian taxation law at both federal and state levels. Lachlan works with clients to assess and manage their tax risks. He has experience working on private binding rulings, taxation audits and stamp duty submissions and related litigation. Lachlan also has experience in advising pro bono clients, including on tax issues relating to charities.

**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

**Raffi Tenenbaum, CTA**, is a Tax Director at William Buck in Sydney. With over 20 years experience in the tax profession across Big 4 firms, mid-tier firms and the ATO, Raffi specialises in advising Australian and foreign businesses on taxation issues impacting their structures and business operations, including equity raisings, IPOs and transactions. Most of Raffi's clients are privately owned business groups of various sizes that regularly grapple with tax issues, including Division 7A, taxation of trusts and CGT small business concessions. He also assists many of his privately owned clients expand their operations overseas, especially into the Asia-Pacific region. Raffi is a regular presenter for The Tax Institute, Television Education Network, CPA Australia and Legalwise, and has presented many sessions and papers on contemporary taxation issues.

# Presenters

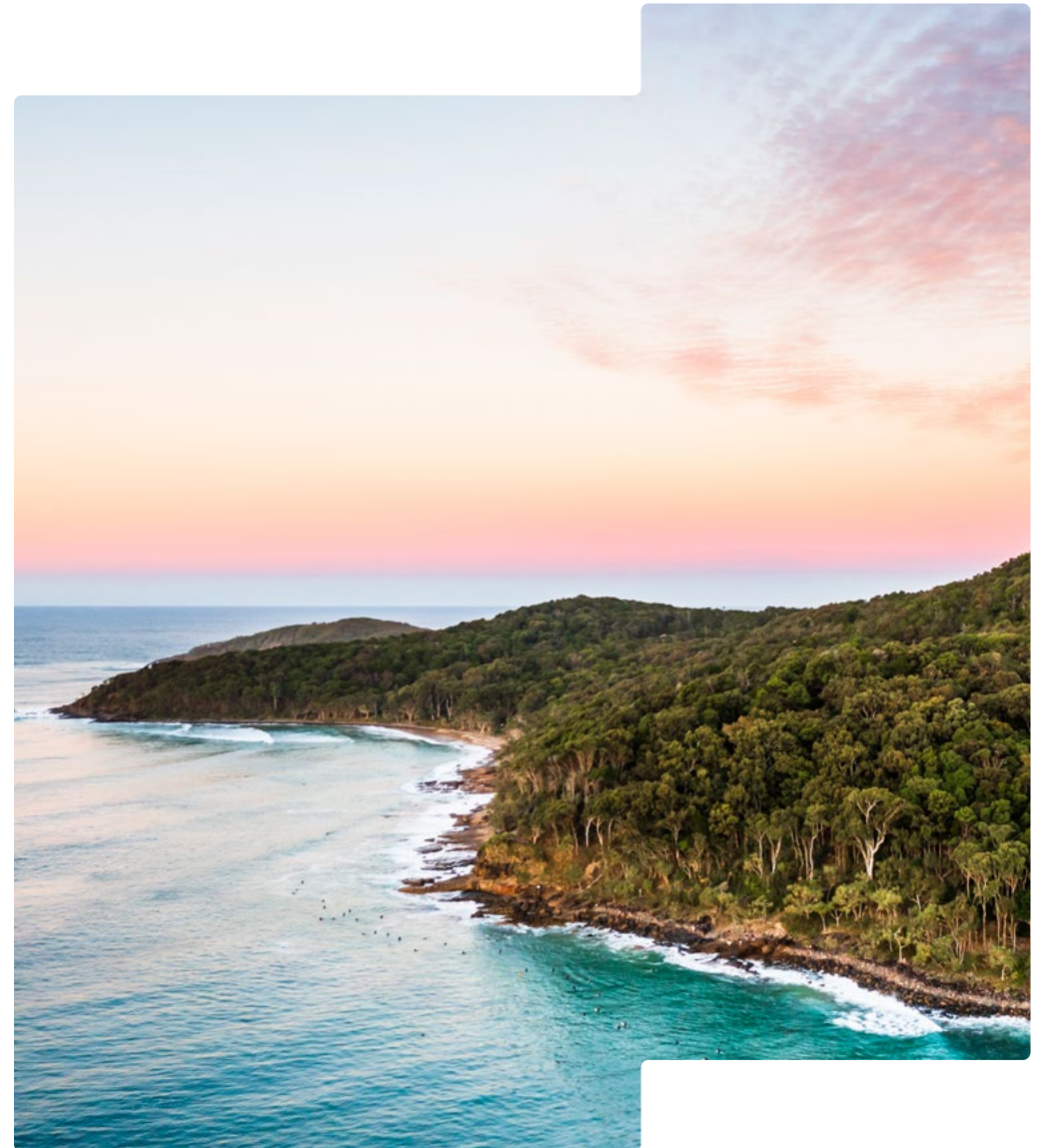
**Jerome Tse, CTA**, is a Partner at King & Wood Mallesons, specialising in taxation disputes and litigation. Jerome is also the firm's global transfer pricing coordinator. Jerome is an experienced tax practitioner and has been involved in a number of Australia's recent high profile tax cases. He is the current President of The Tax Institute.

**Rachel Vijayaraj, CTA**, is a Partner at Brown Wright Stein Lawyers with a broad practice advising individuals and SME owners on commercial, tax, trust, estate planning and deceased estate matters. Rachel values forming meaningful relationships with clients and providing advice in collaboration with their accountants on their personal, business and tax affairs. Rachel also heads up the not-for-profits practice, assisting clients establish charitable funds and organisations.

**Tom Walrut, FTI**, is a Senior Associate at Cooper Grace Ward Lawyers with over 14 years' experience in providing tax advice to clients on both State and Federal tax issues. Tom primarily works with SME clients in a broad range of industries advising on tax planning, transactional matters, structuring and general commercial matters. He also regularly acts for clients in taxation

objections and disputes with both State and Federal Revenue Authorities.

**Adrian Zuccarini, FTI**, is Law Interpretation Director within Tax Counsel Network with 15 years' experience at the ATO. He provides technical advice and guidance on complex technical issues arising within the Private Groups, High Wealth Individuals and Public Group and International areas. Prior to working in Tax Counsel Network Adrian has worked in the Private Wealth business line, with a focus on issues affecting professional firms. Adrian holds a Bachelor of Business with Honours in Taxation and a Master of Laws (Juris Doctor) from Monash University and is admitted to legal practice.



# Venue and accommodation

## Sofitel Noosa Pacific Resort

14–16 Hastings Street, Noosa Heads, QLD, 4567

The Sofitel Noosa Pacific Resort offers a relaxed experience in high style drawing inspiration from Noosa's unique coastal culture while celebrating innovation and the French *art de vivre*. From the luxurious AQUA Day Spa through to a full range of leisure activities including Noosa's Main Beach and National Parks at your doorstep . . . The very spacious, self-contained guest rooms come complete with private balconies and spa baths.

### Getting there

The Sofitel Noosa Pacific Resort is approximately a two-hour drive from Brisbane Airport or 40 minutes drive from Sunshine Coast Airport.

### Parking

Car parking is \$25 per day for self-parking or \$35 per day for valet parking at the Sofitel Noosa Pacific Resort.

### Accommodation

Favourable room rates have been negotiated and secured at the Sofitel Noosa Pacific Resort. Accommodation bookings can be made through our accommodation and travel provider, Accommodation Link, by following the link on the event web page <https://www.conferencenational.com.au/2022noosatax>.

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.



# Event information

## Registration options and inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Convention lunches	Convention Welcome Reception and Convention Dinner*
<b>Full registration</b> This registration option entitles one delegate to attend the entire event.	✓✓✓	✓✓✓	✓✓✓

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

Register online at <https://www.taxinstitute.com.au/events/conventions-retreats/noosa-tax-convention>

## Early bird registration

All registrations received and paid on or before Friday, 21 October 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.

## 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.

## Welcome Reception – Wednesday, 16 November 2022

For delegates arriving on Wednesday, 16 November, a welcome drinks reception will be held poolside at the Sofitel Noosa Pacific Resort from 7.00pm. The welcome drinks reception is included in the event registration fee for delegates, and additional tickets can be purchased for accompanying persons and guests at a cost of \$50. Please indicate your requirements, including dietary requirements, on the registration form. 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

Please see page 14 for registration inclusions.

### Full registration

	Member	New member*
<b>Early bird registration</b> Received on or before 21 October 2022	<input type="checkbox"/> \$1,900	<input type="checkbox"/> \$2,240
<b>Standard registration</b> Received after 21 October 2022	<input type="checkbox"/> \$2,100	<input type="checkbox"/> \$2,440

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

Promotional code:

### Welcome Reception

The Welcome Reception is INCLUDED in the registration fee for delegates attending the full conference.

Wednesday, 16 November: Poolside, Sofitel Noosa pacific Resort

- 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 \$50 per person

No.  x tickets at \$50 each: \$

Dietary requirements:

### Convention Dinner

The Convention Dinner is INCLUDED in the registration fee for delegates attending the full conference.

Thursday, 17 November

- Yes, I WILL be attending the Convention Dinner OR  
 No, I WILL NOT be attending the Convention Dinner  
 Yes, I require additional tickets for the Convention Dinner at \$150 per person

No.  x tickets at \$150 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:





# Thank you.

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

Kim Reynolds, CTA, Co-Chair, Convention Organising Committee

Emma Woolley, Co-Chair, Convention Organising Committee

Anthony Bach, CTA, Australian Taxation Office

Leo Efthivoulou, CTA, ENA Law

Michelle Hartman, CTA, PwC

Morag Ingham, CTA, Grant Thornton

Mariana von Lucken, CTA, HLB Mann Judd

John Middleton, CTA, Australian Taxation Office

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