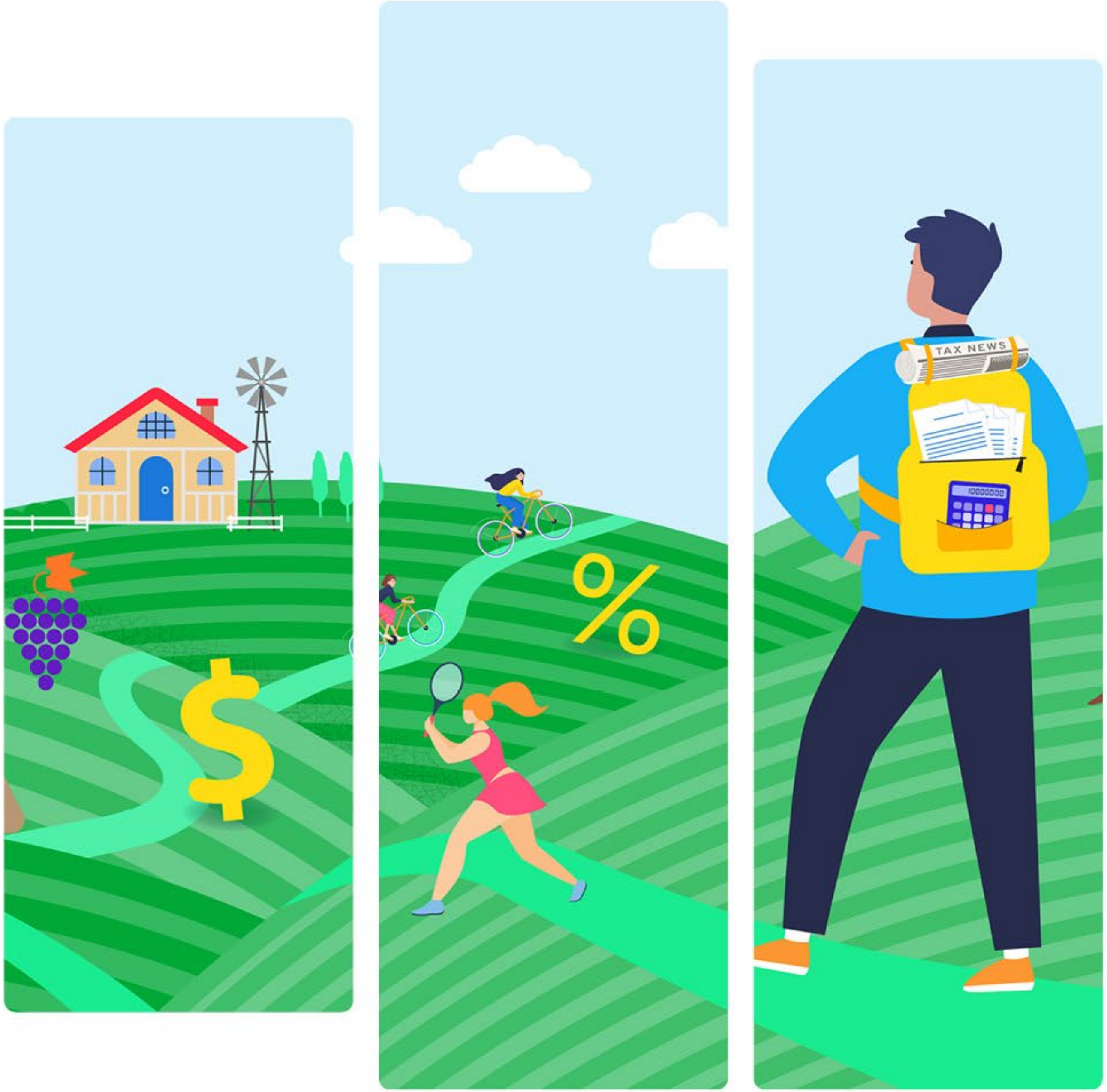
The Tax Institute

Barossa Convention

9–11 August 2023

Novotel Barossa Valley Resort

12 CPD hours



Welcome

It's Game Day

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.

South Australians are passionate about their sport and, with this in mind, the theme for the 2023 convention is 'Game Day'. I encourage everyone to '*get around*' the Barossa, take it '*just one session at a time*' and '*go home with the [CPD] points*'.

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 will be plenty of key takeaways with sessions to have practical examples, tips and strategies delivered in a variety of formats including panels and technical sessions covering a range of hot topics including 100A, pre-transaction restructuring and Division 7A. You will also gain key insights into the shape of global markets, appreciate how family law cuts across what we do as tax advisors and better understand the ATO's current approach to the recovery and enforcement of debts.

Unique industry networking and idyllic destination

This year we'll be returning 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 up early bird registration offers and secure your ticket to the Barossa. I look forward welcoming you to Game Day!

George Hodson, CTA
Chair, Barossa Convention Organising Committee

Proudly supported by:

CLIFTONHALL Frontline ACCOUNTING accountancy insurance

Technical program

Day 1 Wednesday, 9 August 2023

Time	Session
From 6:45pm	Registration
7:00–9:00pm	Welcome reception

Proudly sponsored by:

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Welcome reception

Show your true colours!

Join us for the official kick-off at the Novotel Barossa Valley Resort and enjoy an evening of beverages and canapes while mingling with your fellow delegates and our esteemed speakers.

Time: 7:00–9:00pm

Venue: Novotel Barossa Valley Resort

Price: Inclusive for all full registration delegates
$80 for additional tickets – see registration form for details

Dress: Business casual with a touch of support for your favourite sport or team!

Early bird pricing offer
Register on or before Friday, 14 July 2023 to save!

Technical program

Day 2 Thursday, 10 August 2023

Time	Session
8:00 – 8:45am	**Registration**
8:45 – 9:00am	**Welcome and President's address**
9:00 – 10:00am	**Session 1: s100A – The state of play** **Speaker: Michael Butler, CTA, Finlaysons, Simon Haines, Australian Taxation Office** The ATO's interpretation of section 100A following the finalisation of its guidance products late last year remains a pressing issue for advisers and their clients going forward. Now that some of the dust has settled, it is timely to take stock of the current state of play as well as the emerging issues in this challenging area. Proving a unique insight into the key issues from the perspectives of both the regulator and private practitioners, this session will address: • Current focus of ATO compliance activity and key ATO concerns • Developments following the ATO's finalised guidance products • Outcomes and lessons from the Guardian appeal decision • Ordinary family or commercial dealings and interface between ATO guidance and the case law; and • Practical issues and tips for navigating your clients through the goal posts.
10:00 – 10:30am	**Session 2: Tax Policy and Advocacy update** **Speaker: Robyn Jacobson, CTA, The Tax Institute** The Tax Institute's Tax Policy and Advocacy (TPA) team continues to focus on educating, and advocating with and on behalf of, our members. The session will cover: • The latest advocacy activities of the TPA team and The Tax Institute's National Technical committees • Key advocacy matters affecting our members; and • The progress of key announced but unenacted measures (ABUMs).

Technical program

Day 2 Thursday, 10 August 2023 continued

Time	Session
10:30 – 11:00am	**Morning tea**
11:00am – 12:00pm	**Session 3: Pre-transaction restructures – Positioning for success** **Speaker: Fiona Stapleton, Thomson Geer Lawyers** Restructuring can be extremely worthwhile leading up to a sale, particularly given the reduction in corporate tax rates and added complexity of non-corporate structures. While it can be difficult to pre-empt a buyer's preferred acquisition pathway, the right planning can make all the difference on game day. This session will review: • Key pre-transaction restructuring options, in particular the use of the Division 122-A, Subdivision 124-M and Division 615 roll-overs • Curiosities within the roll-over provisions • Consequences of the different roll-overs; and • Deemed acquisition dates for the purposes of the CGT 50% discount.
12:00 – 1:00pm	**Session 4: The cutting edge of small business CGT concessions – Planning and traps** **Speaker: Joshua Pascale, Cowell Clarke** Where available, the small business CGT concessions remain some of the most powerful concessions available under the Australian tax law. This session will delve into the tricky issues, traps and planning opportunities arising from the presenter's experience in advising on the concessions in practice. Topics covered will include: • Connected entities and affiliates – getting it right • $2M turnover test – not always what it seems • Maximum net asset value test – related liabilities, timing and planning issues • Issues with companies with different classes of shares • 15-year exemption – retirement in connection with multiple CGT events • Using the replacement asset roll-over in conjunction with other concessions; and • Extracting proceeds from entities – trips and traps. This session will not be an introduction to the small business CGT concessions and a reasonable understanding of the concessions will be assumed.
1:00 – 1:45pm	**Lunch**

Technical program

Day 2 Thursday, 10 August 2023 continued

Time	Session
1:45–2:45pm	**Session 5: Taxing times – how to effectively navigate the family law, tax and accounting aspects of separations** **Speakers: Rose Cocchiaro, Resolve Divorce, Tim Stokes, FTI, HWL Ebsworth Lawyers, Sally Storey, CTA, Brentalls SA** Complex tax (and other..!) issues frequently arise in family law matters and can sometimes be an afterthought in a negotiation that focuses more on balancing party interests. It can be a challenge for advisors to consider CGT, Division 7A, trust, and corporate law issues and to work out how they might be treated in a separation. This is also particularly important for families looking to protect intergenerational wealth when taking steps to protect it from their children's future spouses. In an engaging panel discussion using relevant case studies, a family lawyer, tax lawyer and accountant will support you to understand how family law, tax advice and practical considerations interplay when advising clients. The panel will discuss: • Common family law claims that can arise on a separation and ways to protect clients from risk, • Tax and general risks to be identified at the outset of a family law dispute and how tax debts can be treated; and • Practical tips from a day to day management perspective and how to put steps in place to protect clients from future claims.
2:45–3:15pm	**Afternoon tea**
3:15–4:00pm	**Session 6: Payroll tax – The gloves are off** **Speaker: Lee Jurga, Perks** This session will consider recent developments in the administration of payroll tax across various States and Territories, with a particular emphasis on the relevant contractor provisions within the context of the health industry. Other topics discussed will be heavily dependent on any topical rulings or case law decisions leading up to the Convention but may include the employee / contractor distinction at common law, the grouping provisions, and the application for grouping exclusion process.

Technical program

Day 2 Thursday, 10 August 2023 continued

Time	Session
4:00–4:45pm	**Session 7: Investing in a multipolar world** Speaker: Tim Clark, Morgan Stanley Geopolitical division and supply chain disruptions have contributed to inflationary pressures in the post COVID era. In 2022 this caused a step change in interest rates from central banks, with unintended consequences being the collapse of several financial institutions in the first quarter of 2023. Having worked for a major European investment bank during the last GFC, Tim will delve into some of the considerations for investing and why this banking cycle looks very different. He will discuss how he is positioning family office portfolios for the opportunity and risks that lie ahead, including; • Consequences of abrupt interest rate changes and emerging risks to financial stability • Understanding the structural and cyclical elements of inflation in a multipolar world; and • Market opportunities and a roadmap for navigating volatility and identifying opportunities
4:45–6:45pm	Free time
6:45pm	Bus departs for dinner
7:00–10:30pm	Convention Dinner
10:30pm	Bus departs for Novotel Barossa Valley Resort

Convention dinner – The Barossa Brownlow

Seats are limited! Register early to avoid disappointment.

The Barossa Brownlow will be held at Salter's Kitchen located in the picturesque Saltram Wine Estate. A perfect opportunity to network with members in the local tax community over great food and drinks.

Date: Thursday, 10 August 2023

Time: 7:00–10:30pm

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

Dress: Cocktail – feel free to go the extra mile and add some glitz and glamour!

Technical program

Day 3 Friday, 11 August 2023

Time	Session
8:45 – 9:30am	**Session 8: The taxation of settlements and compromises** **Speaker: Sam Ure, South Australian Bar** Settlements and compensation payments arise in many contexts and their tax treatment presents a variety of issues. This session is intended to give an understanding of: • The replacement principle and determining the character of a compensation payment or settlement sum • The application of CGT to compensation payments and settlement sums • Tax treatment of compensation on compulsory acquisition of land and extinguishment of businesses • Adjustment of awards of damages by courts to reflect taxation under a counterfactual • The application of GST to compensation payments and settlement sums; and • The ATO's view and key rulings.
9:30 – 10:15am	**Session 9: Is this the end of special purpose financial Accounts? Accounting for the tax practitioner** **Speaker: Simon How, CTA, Bentleys** We sometimes say to our clients and users of our accountant prepared financial statements "we are not required to apply all accounting standards, this is just for preparing a tax return" as an excuse to not comply with onerous accounting standard requirements. Is this still the case? The Australian financial reporting landscape recently changed with certain for-profit entities required to transition to a General Purpose Financial Statements (GPFS) regime. Many overlooked this change with COVID and other distractions at play. This session will consider the changes, transition, disclosure relief and what you need to do to ensure you are across the main aspects of the changes when speaking to clients and preparing accounts. The session will consider: • Who is impacted by the changes and how • Legal issues associated with the change, including appropriateness of off the shelf companies and trusts • Which accounting standards are likely to cause you the most compliance issues • Opportunities to seek relief from the rules or otherwise manage the impact of the rules for your clients; and • Tax issues associated with changes in accounting policies for your clients.
10:15 – 10:45am	**Morning tea**

Technical program

Day 3 Friday, 11 August 2023 continued

Time	Session
10:45 – 11:45am	**Session 10: The Law and the Lore, has the Australian Taxation Office overstepped the mark?** **Speakers: Dr Sylvia Villios, CTA, University of Adelaide, Carlie Frantzis, Cowell Clarke** To maintain the integrity of Australia's tax system, tax law must be made and administered in accordance with the rule of law and the doctrine of separation of powers. Australia's tax laws have always been complex and the ATO's role is a difficult one. The ATO's administrative function includes publishing the Commissioner's guidance to assist taxpayers and their agents comply with the law. This session will discuss the evolving role of the ATO and consider several scenarios where the ATO may be overstepping its role as an executive body in exercising judicial and legislative functions through issuing guidance of the Commissioner's interpretation. The broader implications of this overreach will also be considered.
11:45am – 12:30pm	**Session 11: Division 7A – Just taking it one debit loan at a time** **Speaker: Robyn Jacobson, CTA, The Tax Institute** Division 7A has been with us for more than a quarter of a century yet, following further refinements to the ATO's treatment of unpaid present entitlements, the operation of Division 7A appears far from set in stone. This session will look at what has changed and what remains the same. Using practical examples, the session will cover: • Recap on the policy intent of Division 7A • What practically changes following the finalisation of TD 2022/11? • How effective are your clients' minimum yearly repayments? – Direct set-off against a dividend – Round-robin set-off against a dividend – Circular round of payments by journal entries • Consequences of failing to make minimum yearly repayments; and • What are your options when you take on a new client and discover debit loans that have not been treated correctly?
12:30 – 1:15pm	**Lunch**
1:15 – 2:15pm	**Session 12: Ethics panel** **Facilitator: Leo Efthivoulou, CTA, ENA Law** **Speakers: Stephen Heath, CTA (Life), Wallmans, Tim Sandow, CTA, BDO** This session will look at ethical dilemmas surrounding conflicts and obligations to clients versus obligations to the "gatekeeper" of tax revenue. The panel will work through real-life scenarios and share their different approaches and view points from both a legal and accountant perspective.

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Day 3 Friday, 11 August 2023 continued

Time	Session
2:15–3:15pm	**Session 13: Recovery and enforcement of ATO debts** **Speaker: Adrian Cartland, Cartland Law, Rebecca Smith, Australian Taxation Office** This session will discuss the tools and procedures the ATO may use to recover debts and the options available in responding to such action, including: • Freezing orders • Garnishee notices • Security notices • Director penalty notices and summary judgment applications • Enforcing capital gains recovery • Helpful strategies for practitioners; and • Opportunities where the ATO can assist.
3:15–3:45pm	**Afternoon tea**
3:45–4:45pm	**Session 14: Tax and capital transactions** **Speaker: Philip Shepherd, CTA, KPMG** With the largest intergenerational transfer of wealth in Australia's history well and truly upon us, many private groups are setting up new structures, restructuring old entities and establishing an operating framework to see them through another generation. The changing of control within private groups will often bring a number of complications, but also opportunities. This session will consider methods for extracting capital out of companies, including the application of: • Dividends, share buy-backs and returns of capital • 177EA • 45A and 45B • Dealing with pre-CGT shares • Liquidators distributions; and • Managing Division 7A in winding up.
4:45pm	**Closing address**

Presenters

Michael Butler, CTA, is the Partner in charge of the Finlaysons Tax & Revenue Group. Michael advises domestic and foreign clients on federal, international and state tax matters, and has a special interest in corporate restructurings, cross-border investment, property, wine and mining taxation, trusts, and estate and succession planning. Michael is a past chair of The Tax Institute's South Australia State Council and a regular contributor to Institute events.

Adrian Cartland is a taxation and commercial lawyer and Principal of Cartland Law. He specialises in devising novel solutions to complex trust, equity, partnership and contract law issues and transactions. He is experienced in all the State taxes, particularly stamp duty and land tax, and advises across the full range of Federal taxes. Adrian is also the Creator of Ailira, the Artificially Intelligent Legal Information Research Assistant, which automates legal research and advice in the areas of tax law, business structuring, estate planning and domestic violence. Adrian is known for his innovative advice and ideas and also for his entertaining and insightful professional speeches.

Tim Clark has 15 years of experience in portfolio management, equity research and investment banking in Australian and international markets. In 2019, Tim joined Morgan Stanley in Adelaide as a portfolio manager. He works in an advisory team led by a former asset manager that manages portfolios for high net worth families and endowment clients. Together they apply an institutional approach to asset management on a global platform. Tim has had a truly global career having worked and lived in Sydney and Boston for Massachusetts Financial Services and visited more than 30 global cities to research companies. Tim's primary responsibility at MFS was researching and recommending global consumer and industrial companies for portfolios with funds under management in excess of US$500bn. He has travelled extensively across North America, Europe, China, India and Japan to research companies. Prior to MFS, Tim worked as an investment banking analyst at Deutsche Bank in Sydney where he advised on and implemented equity capital raisings including follow-on and initial public offerings. Tim started his career in Adelaide in 2006 working in corporate advisory for Taylor Collison.

Rose Cocchiaro is an Accredited Specialist in Family Law, a Certified Divorce Coach and the Founder and Managing Partner of Resolve Divorce. Rose is a true innovator and passionate driving force behind Resolve Divorce and an acknowledged thought leader in the family law space. Resolve Divorce is South Australia's largest specialist family law firm with the highest concentration of Accredited Specialists in the state, many of whom are also qualified Divorce Coaches. Their aim is to improve the way people in our community experience divorce and support clients to restructure their families in a way that achieves strategic legal and emotional outcomes that positively influence their lives. Rose believes in supporting the community to demand more from their legal experience during divorce and is determined to disrupt the legal industry to promote social change. As a multi-award finalist of many prestigious awards categories including winner of the 2019 Thought Leader of the year at the national law awards, finalist in a multitude of Australian law awards including Innovator of the year and boutique firm of the year, 2018 Telstra Business Awards Emerging and Energised and a Leading Family Law firm in the Doyle's guide for every year running, Rose and Resolve Divorce, have been acknowledged and celebrated for their innovative and non-traditionalist, customer centric approach to the practice of family law.

Carlie Frantzis is a Lawyer in Cowell Clarke's Tax and Revenue group. Carlie assists in advising on Federal income tax and State revenue law issues and has been involved in obtaining various ATO private binding rulings on behalf of clients, as well as assisting in ATO reviews and audit matters. In 2022, Carlie completed her Honours dissertation (supervised by Sylvia Villios), which considered whether the ATO is overstepping its role as an administrative body.

Simon Haines, FTI, is an Assistant Commissioner in the ATO's Tax Counsel Network. He has more than 24 years of experience in taxation, including periods in the ATO, Treasury, and private practice. Simon currently specialises in income tax issues affecting private business structures, including trusts, Division 7A, section 100A and Part IVA. He was a co-author of the ATO's Decision Impact Statement for *Commissioner of Taxation v. Guardian AIT Pty Ltd ATF Australian Investment Trust* [2023] FCAFC 3.

Stephen Heath, CTA, is a Partner in the Taxation & Revenue section of Wallmans Lawyers, with his principal practice areas being superannuation and tax. He also works on general commercial matters with a focus on tax planning, business structuring and insurance. Steve is a

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recent past member of The Tax Institute's State Council and National Council.

Simon How, CTA, is a tax consulting partner at Bentleys SA. Simon provides specialist taxation advice with a focus on clients in the SME & International market. Simon regularly provides advice on tax aspects of deals, structuring and restructuring groups with a particular focus on tax consolidation and CGT outcomes. Simon has over 25 years' experience in public practice and with the ATO and is a regular contributor to the Taxation Institute and other relevant bodies.

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She has 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 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 five times over four consecutive years as Winner of this category at the Women In Finance Awards in 2019, 2021 and 2022, 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.

Lee Jurga is an Associate Director in the Tax Consulting Team at Perks in Adelaide. He has 16 years of both private and public sector experience advising on State and Federal taxation issues. He currently advises SME clients and high net worth individuals on a range of taxation issues and tax effective restructuring and succession strategies from both a State and Federal tax perspective.

Joshua Pascale is a Senior Associate in Cowell Clarke's Tax and Revenue and Superannuation Groups. Josh advises property and business owners on a wide range of federal and state tax law issues, as well as pertinent superannuation and commercial law matters. Joshua has developed a particular interest in group restructures and the associated succession planning (private and business). Josh is a co-author of the Tax Institute's SMSF Income Stream Guide and Cowell Clarke's Australian Agribusiness Advisers' Guide.

Tim Sandow, CTA, is an experienced tax professional with 30 years in the 'Big 4', he provides income tax related advice to a variety of private and large public companies as well as multi-nationals. In particular, Tim has advised many companies on mergers & acquisitions, tax governance, corporate tax, international tax, and employment tax issues, always maintaining a focus on practical commercial advice. One of Tim's key skills is understanding complex tax issues and communicating these in a practical way enabling CFO's, Boards and Business Owners to focus on the key opportunities and risks when making business decisions. Tim is currently the SA representative on National Council of The Tax Institute.

Philip 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.

Rebecca Smith was admitted to practice in 2001 and has held in various legal roles in the ATO since 2008. She is currently a senior lawyer in the Review and Dispute Resolution Branch, an independent business line responsible for managing tax technical, debt recovery and insolvency litigation on behalf of the Commissioner.

Fiona Stapleton is a Senior Associate in the tax team at Thomson Geer Lawyers. She has experience in providing taxation and commercial advice to a wide variety of clients including private and listed companies, high net worth individuals and private equity funds. Fiona enjoys working closely with clients to understand their commercial issues and objectives in order to deliver the right outcomes.

Timothy Stokes, FTI, is a tax, not-for-profit and charity law specialist. Tim works with complex family groups and high net worth individuals, private and listed companies, private equity and

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not-for-profit organisations across Australia. He has over 15 years of experience assisting clients to establish effective and efficient structures, manage complex tax positions, buy and sell assets and businesses, deal successfully with revenue authorities, navigate all stages of the tax controversy spectrum (including litigation) and design and implement comprehensive governance, succession planning and asset protection strategies. He has also assisted in a number of complex, high value family law proceedings, including as a single expert in a number of cases.

Sally Storey, CTA, is passionate about helping her clients grow and protect their wealth, and achieve financial freedom. Sally is a Fellow of Chartered Accountants Australia and New Zealand and holds a Masters in Applied Taxation. With 20 years' experience in all areas of accounting, taxation and business advisory services, Sally has helped many clients navigate the ups and downs of their business and personal finance journeys.

Dr Sylvia Villios, CTA, is an Associate Professor at the Adelaide Law School, University of Adelaide. She researches and teaches in taxation law, particularly focusing on questions about the operation of the Australian tax system, taxation policy, corporate taxation and the role, powers and accountability of the Commissioner of Taxation. Outside of her primary research area, she has published extensively on the role and operation of Australia's succession laws. Dr Villios is a co-director of the Regulation of Commercial, Corporations, Insolvency and Taxation (ROCCIT) research unit which is based at the University of Adelaide. She is an editorial panel member of the Australian Tax Law Bulletin, Lexis Nexis. During her academic career she has published over 35 peer-reviewed journal articles. She has a strong industry presence and sits on several state and national Tax Institute committees. Dr Villios' background in taxation and commercial law extends beyond academia and includes experience in legal practice.

Sam Ure, FTI, returned to Adelaide in 2019 having established a reputation among the leading junior counsel in tax over a decade practising at the Melbourne bar. He advises and appears in all revenue matters, including State tax and superannuation matters. Sam also practises in commercial disputes, administrative law and regulatory proceedings.

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 (8 August) to Saturday (12 August).

Rooms are limited and must be booked prior to 9 July 2023. 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.

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

Welcome Reception | Wednesday, 9 August 2023

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 | Thursday, 10 August 2023

Join your esteemed colleagues for the night of night's – The Barossa Brownlow

This much-anticipated event is returning to Salter's Kitchen located in the picturesque Saltram Wine Estate. Network with fellow members of the local tax community over a 3-course meal paired with delicious local wines. Dress to impress with a cocktail dress code or feel free to go the extra mile and add some glitz and glamour! This unforgettable event is included in the registration fee for delegates attending the full convention.

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 (CPD)

Attendance at the Convention counts for 12 hours of CPD 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 Convention.

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.

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.

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

Registration

Registration inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Lunches	Welcome reception and convention dinner*
Face-to-face full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Day registration This registration option entitles one delegate to attend a full day of technical sessions.	✓	✓	

*Additional tickets to the welcome reception and convention dinner can be purchased on the registration form.

Please note: Registration fees do not include travel, accommodation, or hotel incidentals.

Discounts

Early bird registration

All registrations received and paid on or before Friday, 14 July 2023 will be entitled to an early bird discount.

Group discount

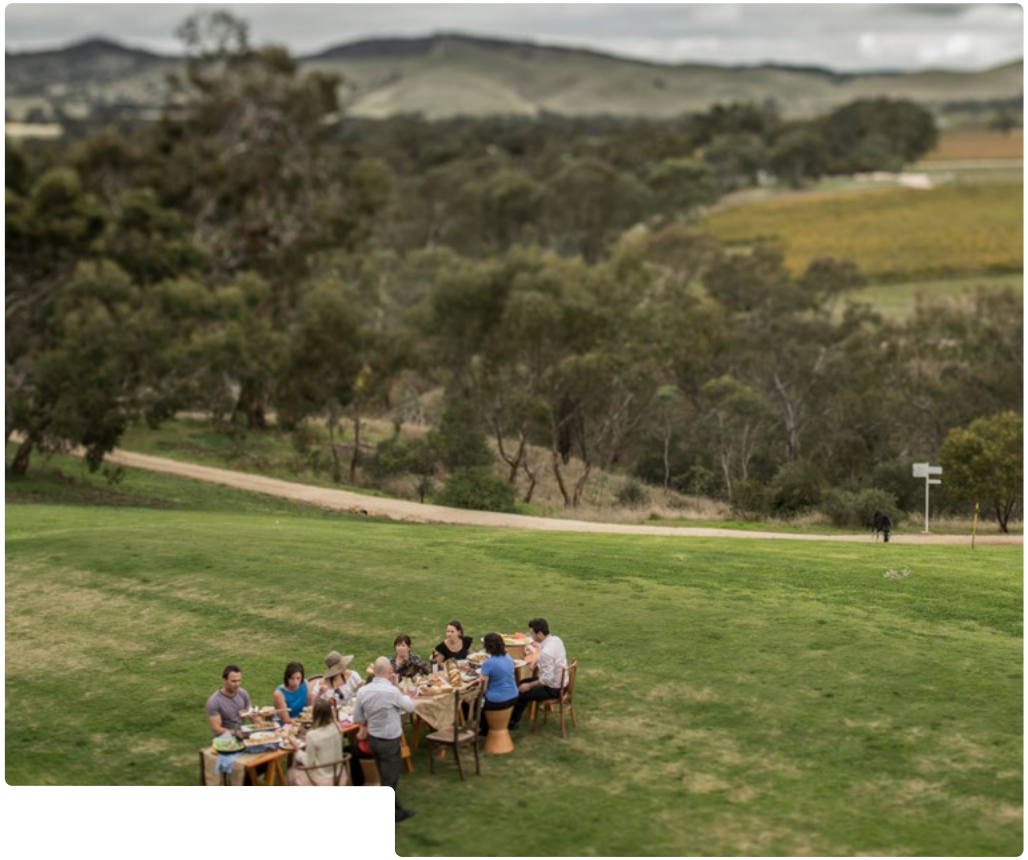
Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

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.

Register now!

Register online ▶

Register via form ▶
included in this brochure



The Tax Institute

Barossa Convention
Registration form

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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 16 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Received on or before 14 July 2023	☐ $1,700	☐ $2,040	☐ $2,000
Standard registration Received after 14 July 2023	☐ $1,900	☐ $2,270	☐ $2,200

Single day registration Please select day: ☐ Thursday ☐ Friday

	Member	New member*	Non-member
Early bird registration Received on or before 14 July 2023	☐ $900	☐ $1,270	☐ $1,200
Standard registration Received after 14 July 2023	☐ $1,100	☐ $1,470	☐ $1,400

☐ 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 Convention.

Wednesday, 9 August: Novotel Barossa Valley 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 networking function at $80 per person

No. ____ x tickets at $80 each: $ ____

Dietary requirements:

Convention Dinner

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

Thursday, 10 August: Salters Kitchen, Saltram Wine Estate

☐ 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 networking function 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: 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

JOIN TODAY

***Become a member and save!**

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

- save $215 off Affiliate membership to 30 June 2024
- access to member-only prices to this and future events
- unlock member-only technical content and resources.

Find out more about membership at
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

23-024EVT_05/23

3 Payment summary

Registration fees	$
Additional guest tickets – welcome reception ($80 each)	$
Additional guest tickets – convention dinner ($150 each)	$
Total payable	$

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

4 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

Thank you.

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

George Hodson, Chair, Barossa Convention Organising Committee
Leo Efthivoulou, CTA, ENA Law
Will Fennell, Piper Alderman
Melissa Harrison, Australian Taxation Office
Daniel Marateo, CTA, Cowell Clarke
Neil Oakes, CTA, Perks
Jessica Pengelly, HWL Ebsworth Lawyers
Nicole Peterson, CTA, PKF Adelaide
Nick Wilkins, CTA, Wilkins Advisory

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