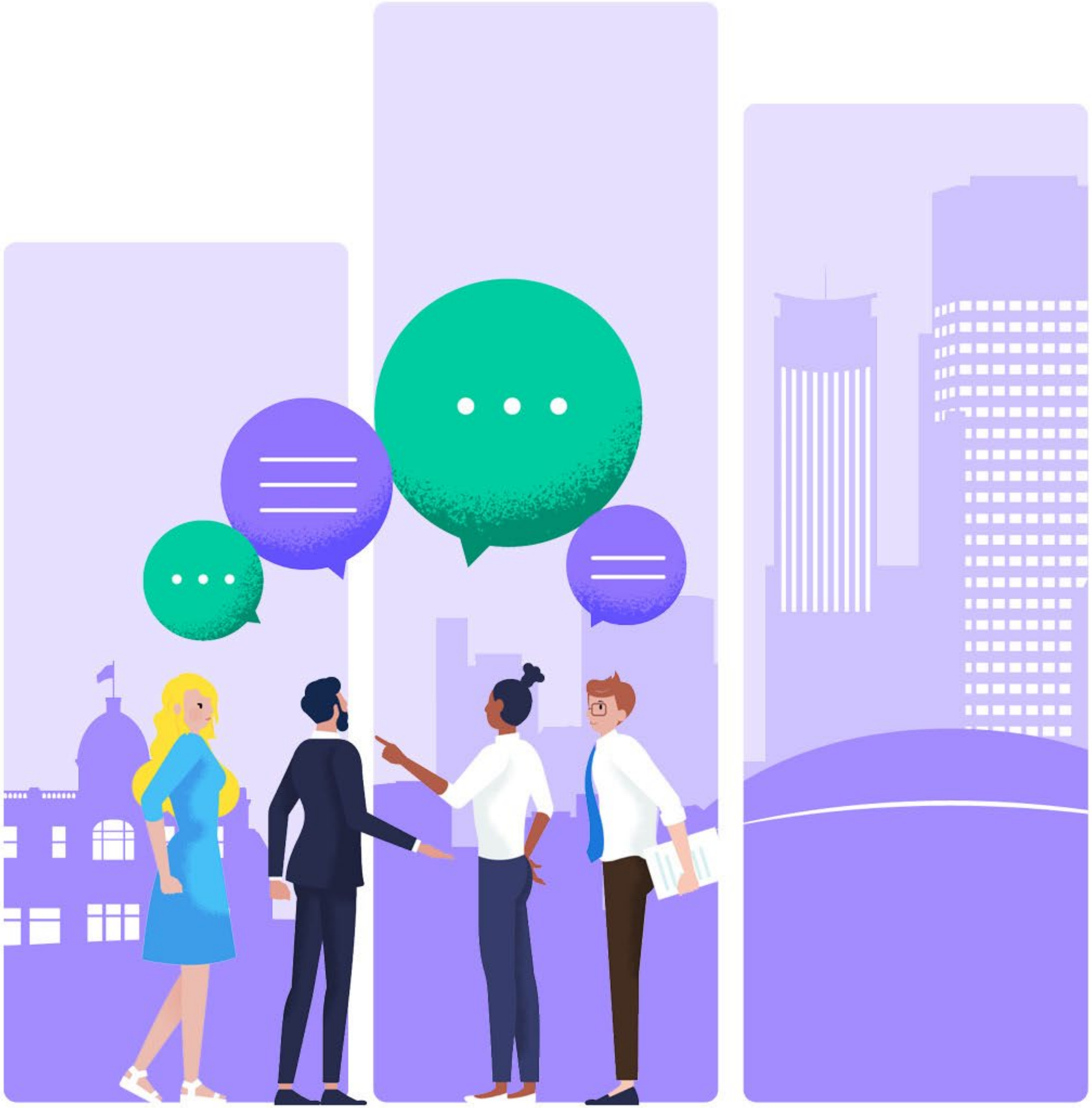
The Tax Institute

SA Tax Forum

11–12 April 2024

Adelaide Oval

13 CPD hours



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

Caitlin Ashworth, CTA, CCK Lawyers (Co-chair of the organising committee)

Josh Pascale, Cowell Clarke (Co-chair of the organising committee)

Monica Mazzachi, KPMG

Anthony Milton, CTA, Australian Taxation Office

Timothy Stokes, FTI, HWL Ebsworth

Nick Wilkins, CTA, Wilkins Advisory

Proudly supported by:

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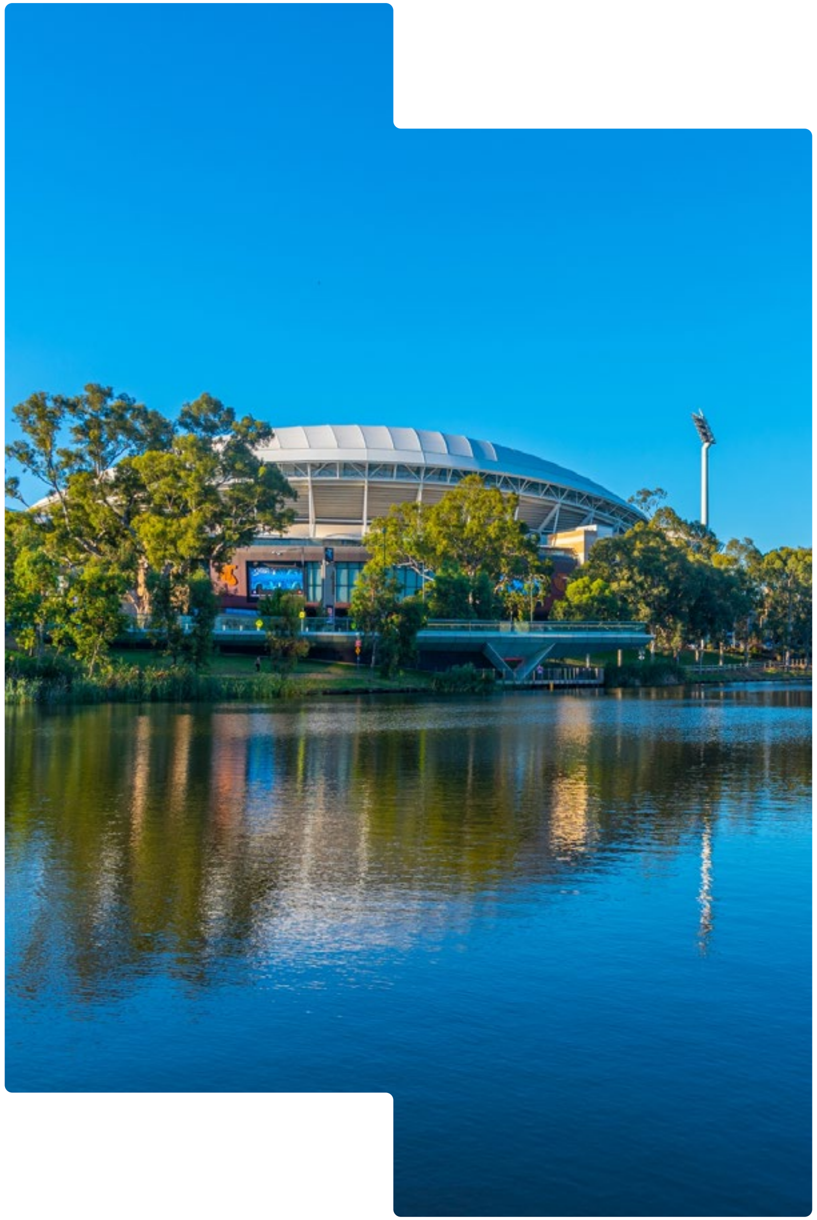


Welcome

Chair welcome

On behalf of the organising committee and The Tax Institute, it is our pleasure to invite you to the SA Tax Forum on 11-12 April 2024.

The SA Tax Forum is one of Adelaide's premier events for tax professionals and provides a great opportunity for you to connect with your peers and grow your tax network.

SA's must attend tax event

The 2024 SA Tax Forum will explore a number of the emerging challenges faced by tax professionals, and their clients, in both their professional and personal lives. Tailor your CPD journey, with your choice of 14 sessions from concurrent streams SME and Hot Topics.

This event will once again feature some of the greatest minds in the industry and, with the help of the organising committee, we have put together another fantastic forum to tackle issues that are at the forefront practitioner's minds, including:

- UPEs and corporate beneficiaries – Revisiting the Division 7A planning issues
  Presented by Paul Tanti, CTA, from Thomson Geer Lawyers, this session will address some of the key division 7A planning issues associated with the use of corporate beneficiaries of discretionary trusts.
- Family Trust Elections
  Revisit the rules and implications of making family trust elections with Linda Tapiolas, CTA, of Cooper Grace Ward Lawyers
- Superannuation earnings tax – What you need to know
  Join Daniel Marateo from Cowell Clarke as he delves into the ins and outs of the Labor government's proposed superannuation earnings tax.

Don't miss your chance to be part of the 2024 SA Tax Forum! We look forward to seeing you there.

Caitlin Ashworth, CTA, CCK Lawyers
Co-Chair, Forum Organising Committee

Josh Pascale, Cowell Clarke
Co-Chair, Forum Organising Committee

Early bird pricing offer
Register on or before Friday, 15 March to save!

Technical program

Day 1 Thursday, 11 April 2024

Time AEDT	Session
8:00–8:30am	**Registration**
8:30–8:45am	**Welcome and President's address** Todd Want, CTA, President, The Tax Institute
8:45–9:30am	**Session 1: UPEs and corporate beneficiaries – Revisiting the Division 7A planning issues** **Speaker: Paul Tanti, CTA, Thomson Geer Lawyers** The recent AAT decision involving Bendel and the Commissioner of Taxation has reignited discussions on the creation of UPEs in corporate beneficiaries. This presentation will address some of the division 7A planning issues associated with the above practice, including: • Revisiting the history of section 109D(3) and subdivision EA • Opportunities and pitfalls in creating UPEs in corporate beneficiaries • Ongoing risk-management issues and ATO administrative compliance; and • Looking beyond the Bendel decision.
9:30–10:30am	**Session 2: Practical application and implications of Section 99B** **Speaker: Michael Butler, CTA, Finlaysons** This session will provide an overview of the application of s 99B to the taxation of trusts by working through a number of practical examples and demonstrating the sometimes uncertain application of sections 99B(1), 99B(2) and 99C. The session will also: • Explore the Commissioner's view in TD 2017/24 and the 'hypothetical taxpayer' • Examine the '*corpus exception*' (and the '*exception to the exception*') • Review the circumstances when an asset will be 'applied for the benefit' of a beneficiary under section 99C; and • The ATO's proposed draft Practical Compliance Guideline (PCG) will also be discussed if it is released before the Forum is held.
10:30–11:00am	**Morning tea**

Technical program

Day 1 Thursday, 11 April 2024 continued

Time AEDT	Session	
11:00am–12:00pm	**Session 3A: Constructive conflicts – Disputes, settlements and insolvencies in building and development** **Speaker: Adam Rosser, Adam Rosser Dispute Resolution** This session will provide an overview of the issues facing builders, developers and private owners in the current market and will discuss: • Practical financial risks involved in building and development contracts • Challenges to enforcing contracts • Disputes and the conciliation or arbitration process • Breach or termination • Typical settlement outcomes and timelines; and • What happens when the builder is insolvent?	**Session 3B: The latest on GST – Not just 10%** **Speaker: Jessica Pengelly, CTA, HWL Ebsworth Lawyers** This session will examine recent developments and practical issues in GST, including: • The latest in common GST property issues, such as: – GST margin scheme issues and lessons – Valuations for GST purposes – The 5 year rule around sales of new residential premises – GST security deposits • GST treatment of food products – including *Chobani* and *Simplot* cases • Other recent GST cases including relating to: – Input tax credit entitlements – GST refunds; and • Current focus areas for ATO reviews and recent ATO guidance

Technical program

Day 1 Thursday, 11 April 2024 continued

Time AEDT	Session
12:00 – 1:00pm	**Session 4: The ins and outs of the CGT main residence exemption** **Speakers: Karen Gregor, CTA, Nexia Edwards Marshall, Paul Dimasi, CTA, Nexia Edwards Marshall** A person's main residence in many cases is their most significant asset. The tax concessions available on a main residence are arguably the most generous in the tax legislation. However, in some cases, actions, inactions, or wrong decisions can result in the main residence exemption being lost in whole or part. Against this background, and in the context of the main residence exemption, the session will address: • Deriving income from a main residence • Demolishing and rebuilding • Relationship breakdowns • Asset protection • Succession and deceased estate issues; and • Foreign residents.
1:00 – 2:00pm *This session will commence at 1:15pm*	**Lunch and an Interview with the CEO** Join The Tax Institute's, CEO, Scott Treatt, CTA, for a candid conversation on the future and direction of The Tax Institute. This session will provide an open forum for delegates to raise any issues affecting the tax community.
2:00 – 3:00pm	**Session 5: Superannuation earnings tax – What you need to know…** **Speaker: Daniel Marateo, ATI, Cowell Clarke** With the Federal Government pushing ahead with its legislation on the highly controversial Division 296 superannuation earnings tax, now is the time for advisers to clients with superannuation account balances nearing or in excess of $3 million to familiarise themselves with the proposed measures and seriously assess the impact on their clients. This presentation will review the operation of the proposed Division 296 tax and outline the key practical issues, planning tips and risk management strategies that advisers need to know in planning for the commencement of the proposed measures. Topics covered will include: • Exploring the calculation of the superannuation earnings tax • Implications of negative earnings • Planning tips and strategies; and • Unanswered and contentious issues.

Technical program

Day 1 Thursday, 11 April 2024 continued

Time AEDT	Session
3:00 – 3:30pm	**Afternoon tea**
3:30 – 4:30pm	**Session 6: Navigating professional standards in a transformative landscape** **Speaker: Peter De Cure AM, Tax Practitioners Board** In this session Peter de Cure AM will provide insights into: • Ethical practice – what can we all learn from the mistakes of others? • Law reform • Understanding the Tax Practitioner's Board's (TPB) expectations; and • Dealing with the TPB.
4:30 – 5:30pm	**Session 7: The impact of AI on the tax profession** **Speaker: Adrian Cartland, Cartland Law** As AI gains prominence, major tech players are actively shaping our future. From education to legal advice and even songwriting, the implications are vast. The rapid acceptance of ChatGPT suggests that putting the AI genie back in the bottle is likely unfeasible. This session delves into the potential consequences of AI for professional advisors. Brace yourself for a thought-provoking exploration that challenges your assumptions.
From 5:30pm	**Networking event**

Networking function

After a full day of technical toil, join your colleagues and conference speakers for an evening of drinks, canapes and networking.

Date: Thursday, 11 April 2024

Time: From 5:30pm

Venue: Adelaide Oval

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

Dress: Business or business casual

Technical program

Day 2 Friday, 12 April 2024

Time AEDT	Session
8:30 – 9:00am	**Registration**
9:00 – 9:30am	**Session 8: Keynote address** Speaker: Bruce Djite, Property Council of Australia
9:30–10:30am	**Session 9: Family Trust Elections** Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers The rules about family trust elections, in particular who is part of the 'family group' and what are 'distributions', are quite complex and commonly misunderstood. This is because 'distributions' outside of the 'family group' could result in the family trust distribution tax being triggered. Family trust distribution tax, if triggered, is a debt that is not subject to a review period and for which the entity (which makes the distribution), together with the individuals who are directors or trustees, can be jointly liable. Therefore, it is important that advisers understand the concepts of 'family group' and 'distributions'. This session will cover: • What are the implications of making a FTE or IEE • When is a FTE or IEE required • Requirement to make a valid FTE or IEE (including issues for testamentary trusts in meeting the 'family control' test) • What are 'distributions' • Which individuals and entities are part of the 'family group' • Who is liable for FTDT • What should the trust deed say to help with these issues; and • Passing control of trusts to the next generation.

Technical program

Day 2 Friday, 12 April 2024 continued

Time AEDT	Session
10:30–11:00am	**Morning tea**
11:00am-12:00pm	**Session 10: The parent trap – Gifts and loans in estates** **Bryan Mitchell, FTI, Mitchells Solicitors** As Gen X and subsequent generations struggle to get a financial foothold in life, their wealthy baby boomer parents have accumulated a surplus which they are now using to fund their children's entry into the property market – either by loan or gift, and either during their lifetime or by way of inheritance. How money is transferred has legal ramifications for all parties and will depend on the nature of the transaction. Gifting and lending between family members often takes place in a casual manner, with the participants oblivious to the legal issues that they are often inadvertently creating, or not creating. This paper looks at gifts and loans in an estate context and what can go wrong, with tips and guidance on how to do it right. This session will look at: • Legal elements of gifts and loans • Examples of loans, inter vivos gifts and gifts in will • What can go wrong • Tips to make it work • Overview of gift and loan back and if it is an effective FPA avoidance strategy; and • Tips on strengthening the gift and loan back strategy.
12:00–1:00pm	**Session 11: The advisor as executor** **Speakers: Bryan Mitchell, FTI, Mitchells Solicitors, Julie Van der Velde, CTA, VdV Legal** This session will discuss the risks attached to the management of deceased estates and how these might be mitigated including issues around: • Charging clauses and commissions • Managing conflicts of interest and of duties • Communicating with Beneficiaries • Risks in seeking commercial outcomes • When and why an LPR might need to seek directions from the court • Adjustments and taking potential tax costs into account • Risks involved in entering into a settlement; and • Who pays which costs.
1:00–2:00pm	**Lunch**

Technical program

Day 2 Friday, 12 April 2024 continued

Time AEDT	Session
2:00 – 3:00pm	**Session 12: Employee vs Contractor** **Speaker: Suzanne Mackenzie, CTA, Bar Chambers** This session will provide an update on the recent developments in the law concerning the characterisation of contractors and other workers as employees under different taxation legislation focussing on what has changed since the High Court decisions in Jamsek and Personnel Contractors, including legislative reform measures, the Commissioner's revised guidance and recent court decisions. This session will also address where clear lines are now drawn for determining whether a worker is an employee or contractor, and where uncertainties continue to plague businesses engaging workers.
3:00 – 4:00pm	**Session 13: Top 500 and Next 5000 – How private groups can get it "right"** **Speaker: Theodore Bourlotos, Australian Taxation Office** This session will address the following: • Key findings from the Top 500 and Next 5,000 2023 findings reports • Why getting the basics right is so important – it can be costly not to • Practical examples which demonstrate effective tax governance; and • Practical examples which demonstrate ineffective tax governance.
4:00pm	**Closing address and afternoon tea**

Presenters

Theodore Bourlotos is a Regional Director for the WA and SA regions of Private Wealth Engagement and Assurance Services. Having undertaken and led engagements on numerous Private Wealth clients in the Next 5,000 and Top 500 programs, he has developed a comprehensive understanding of the ATO's work Tax Avoidance Taskforce funded work programs and possesses a deep practical knowledge of tax governance principles and how they apply in a practical context.

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.

Peter de Cure AM, is the Chair of The Practitioners Board. He is a professional non-executive director. His experience in tax matters has developed over a 25-year career as a tax partner with KPMG, and as a registered tax agent for 16 years. Peter is a Fellow of the Australian Institute of Company Directors and a Fellow of Chartered Accountants Australia and New Zealand. He is Chairman of the Royal Flying Doctor Service SA & NT, Chairman of Wirra Wirra Vineyards, Chairman of Accord Property Holdings Pty Ltd and the Accord Property Development Fund, a Director of PMB Defence Pty Ltd and Presiding Officer of the South Australian Fire & Emergency Commission, a Director of Variety the Children's Charity SA, and advisory board Chairman of Tim Adams Wines.

Paul Dimasi, CTA, is a Business Consulting Services Partner at Nexia Edwards Marshall and current chair of the Property & Construction group for the firm. He has over 15 years' experience in taxation and accounting services to small, medium and large businesses, with considerable experience in the property and construction industry.

Bruce Djite is the Executive Director of the SA Division of the Property Council of Australia. He was previously CEO of the Committee for Adelaide and Director of Football at the Adelaide United Football Club. He is currently the Deputy Chair of the West Beach Trust and sits on the boards of the South Australian Multicultural Commission, Children's University Advocacy Board and is a South Australian Regional Committee Member of the Winston Churchill Trust. Bruce is also a Football Analyst on Paramount+ and Network 10 and was a Beyond Greatness Champion for the 2023 FIFA Women's World Cup. Prior to entering the corporate world, Bruce was a professional footballer, representing the Socceroos, Adelaide United FC as well as clubs in several countries including, Turkey, China, South Korea and Indonesia.

Karen Gregor, CTA, is a Specialist Tax Consultant in Nexia Edwards Marshall's Business Consulting and Taxation Divisions. Karen has over 20 years' experience advising clients across many areas and has helped many clients deal with difficult areas of taxation law, including GST and CGT, working with them to find a solution, even when the legislation is ambiguous. She works with clients throughout the life cycle of their business by advising them during its establishment and operation, then, if necessary, working on exit strategies and winding up.

Suzanne Mackenzie, CTA, is a Barrister specialising in financial services, superannuation, trusts and equity, and taxation law. 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. Suzanne regularly appears in the Federal Court and the Supreme Court of South Australia and more recently has acted for the trustees of AustralianSuper, Host-Plus and Equip Super in applications before the Supreme Court of South Australia.

Presenters

Daniel Marateo is a Senior Associate in Cowell Clarke's Tax & Revenue and Superannuation groups. Daniel advises SMSF trustees and advisers on the taxation issues associated with superannuation, as well as on compliance with superannuation regulatory standards. Daniel also advises in relation to State revenue law and Federal income tax issues, including structuring and restructuring for tax effectiveness and asset protection. Daniel is a co-author of the Tax Institute's SMSF Income Stream Guide.

Bryan Mitchell, FTI, is the managing director of Mitchells Solicitors. He is an Accredited Specialist in Succession Law and a full member of the Society of Trust & Estate Practitioners ("STEP"). Bryan & his firm are recognised leaders in Estate Planning and Estate Litigation in Australia. His practice works almost exclusively in the areas of Wills, Estates, Trusts & Elder Law. Bryan is a regular presenter. He is the recipient of the STEP Australia Masters Award 2023; immediate past Chair of STEP Australia; former Chair of STEP Queensland; Deputy Chair for the Queensland Law Society ("QLS") Succession Law Policy Committee; Deputy Chair of the QLS Succession Law Specialist Accreditation Advisory Committee; and member of the University of Queensland Law School Advisory Board.

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. Prior to joining HWL Ebsworth, Jessica worked for the ATO and was part of the ATO's Tax Counsel Network, specialising in international tax and GST. Jessica has a particular interest in tax litigation and dispute resolution, indirect taxes, international tax and corporate transactions, and is passionate about working with her clients to formulate solutions to complex tax problems.

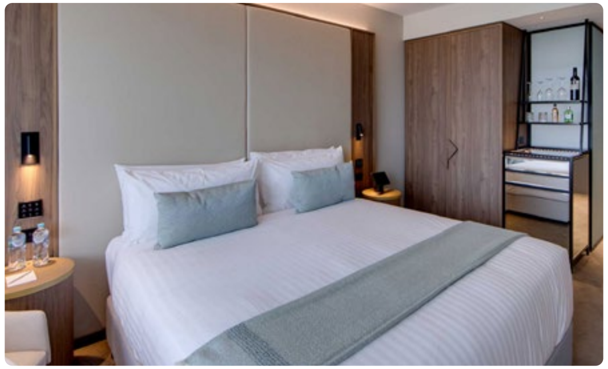
Adam Rosser is a barrister and solicitor from South Australia, a nationally accredited mediator and arbitrator, and a trained conflict management coach. Adam was admitted to practice in Australia in 2000 and served as an associate to a Supreme Court Judge before entering private practice. Adam specialises in legal dispute resolution services in commercial matters, particularly in the construction, engineering and technology fields. Adam has represented construction contractors, high-tech manufacturers, and engineering firms in litigation around Australia, both as plaintiff and defendant. Since 2022, Adam has acted as an impartial mediator or arbitrator to help parties resolve their disputes. Adam regularly presents to engineers, architects, accountants, lawyers and professional organisations on topics related to dispute resolution and dispute avoidance.

Paul Tanti, CTA, is a partner in the Thomson Geer Tax Section and has a broad range of experience in providing specialist taxation and commercial advice to a wide variety of clients. His broad base of clients includes legal and accounting firms, private and listed companies, high net worth individuals, and private equity funds. Paul advises on all areas of Federal and State taxation law and related commercial matters. Paul is a regular speaker on tax and related commercial matters for various professional bodies. He is a member of The Tax Institute, a member of the Law Council of Australia's Business Law Committee (South Australian Tax Sub Committee), and a member of the South Australian State Taxes Liaison Group.

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.

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 25 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.

Venue and accommodation



Adelaide Oval

War Memorial Dr, North Adelaide SA 5006

Adelaide Oval is situated right in the heart of the city, framed by the River Torrens and surrounding precinct. Whether you're travelling by car, bus, train or tram, Adelaide Oval's close proximity to the CBD makes it easily accessible.

Getting there

Adelaide Oval is situated right in the heart of the city, framed by the River Torrens and surrounding precinct and is a short 6kms from Adelaide airport. If travelling from interstate on the morning of the event, delegates can take advantage of a plethora of travel options, including bus, taxi, shuttle or town-car.

Accommodation

Favourable room rates have been negotiated and secured at the Oval Hotel. Accommodation bookings can be made by following the link on the event web page or via this link: https://www.ovalhotel.com.au/offers/hotel/functions-events/

Each of the 138 guest rooms offers contemporary design, enhanced by custom furnishing and in-room technology. Every part of your experience has been carefully considered, from your welcome drink on arrival through to thoughtful extras included in your stay.

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

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 13 hours of Continuing Professional Development with The Tax Institute.

The Tax Institute's Attendee Hub

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

Delegate list

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

Dress code

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

Networking function

A networking function will be held directly following the last session on Thursday from 5.30pm at the Adelaide Oval. The networking function is included in the conference registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of $80. Please indicate your requirements, including dietary requirements, at the time of registration.

Special dietary and accessibility requirements

Please indicate any special dietary requirements at the time of registration. Please email us with any accessibility requirements at nationalevents@taxinstitute.com.au.

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. 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.

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

Registration

Registration inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ conference lunches	Networking function*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Employer registration This registration option allows one registration to be shared between multiple attendees from the same firm.	✓		

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

Register now!

Register online ▶

Register via form ▶ included in this brochure

Discounts

Early bird registration

All registrations received and paid on or before Friday 15 March 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.

The Tax Institute

SA Tax Forum
Registration form

43719 | 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

Please see page 15 for registration inclusions.

Full registration – 13 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday 15 March 2024	☐ $1,600	☐ $1,970	☐ $1,900
Standard registration Register after Friday 15 March 2024	☐ $1,800	☐ $2,170	☐ $2,100

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

Networking function

The networking function is INCLUDED in the registration fee for delegates attending the full conference.

Thursday, 11 April at the Adelaide Oval

☐ Yes, I WILL be attending the networking function OR

☐ No, I WILL NOT be attending the networking function

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

Dietary requirements:

______

***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** for the first 12 months
- member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at
taxinstitute.com.au/membership

JOIN TODAY

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

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

3 Breakout session options

Please tick the breakout sessions you would like to attend during the forum:

Thursday, 11 April

11:00am–12:00pm

☐ Session 3A: Constructive conflicts – Disputes, settlements and insolvencies in building and development

☐ Session 3B: GST hot topics

24-012EVT_11/23

4 Payment summary

Registration fees	$
Additional guest tickets – Networking function ($80) 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

The Tax Institute

Employer Ticket Registration Form

43719 | 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 Employer Ticket types

Employer tickets offer a flexible option for employers to send multiple attendees to an event. We have different options to suit you and your team.

	Classic	Plus	Premium	Tailored
Early bird on or before 15 March	$3,250	$4,750	$6,250	
Standard after 15 March	$3,450	$4,950	$6,450	
Best for	SME	Mid-Tier	Corporate	Large/National
Flexibility	Your choice of 20 sessions	Your choice of 40 sessions	Your choice of 60 sessions	Contact us to tailor a quote today for you and your team to attend multiple events.
Team attendance	Up to 5 attendees	Up to 10 attendees	Up to 15 attendees	
Session formats	Face-to-face	Face-to-face	Face-to-face	
Networking	2 networking passes	5 networking passes	10 networking passes	

All Employer Ticket attendees receive:

- Electronic access to download available technical papers and presentations
- Morning tea, lunch and afternoon refreshments
- CPD hours allocated according to attendee

1 session = 1 CPD hour per attendee

Session selection

- Coordinators will be contacted with a session selection form to complete on behalf of attendees, based on the Employer Ticket type selected.
- The session selection form must be completed in full to ensure proper allocation of CPD hours post-event.

1 Employer Ticket types

Promotional code:

Ticket type	Cost	No. of tickets	Sub-total
☐ Classic			
☐ Plus			
☐ Premium			
		Total payable $	

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

3 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.

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

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