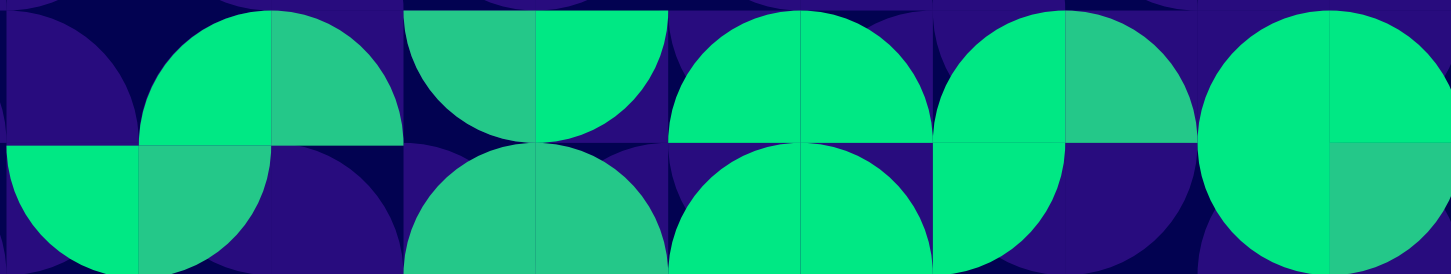


 **The *Tax*  
Summit**

 **The Tax Institute**



# SHAPE THE MOMENT

3–5 September 2025

MCEC Melbourne

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# SHAPE THE MOMENT at The Tax Summit



From powering small businesses, to supporting growing families, from innovative Australian industry to cross-border collaboration, tax shapes our world.

But *you* shape tax.

You build your skills and expertise. You uphold integrity and ask the tough questions with insight and respect. You choose to approach every challenge as an opportunity. You can't always predict or control the future, but the current moment belongs to you.

Join thought leaders, industry experts, and fellow practitioners at The Tax Summit in 2025 to explore the tools, knowledge and connections you need to thrive as a tax professional in today's changing landscape.

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how will you shape the moment?

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# Committee Chairs



**Tim Sandow, CTA**

Organising Committee Chair  
President, The Tax Institute



**Sandra Farhat, FTI**

Program Committee Co-Chair  
EY



**Daniel Smedley, CTA**

Program Committee Co-Chair  
Sladen Legal



**Loreena Gillon, CTA**

SME Stream Chair  
Arithmos Chartered Accountants



**Paul Banister, CTA**

Special Topics Stream Chair  
Grant Thornton




**Leo Efthivoulou, CTA**

Hot Topics Stream Chair  
ENA Law



**Annemarie Wilmore**

Corporate Stream Chair  
Johnson Winter Slattery



For those  
who want to  
be inspired  
by the  
**brightest  
minds in tax**

## Who should attend?

### **Taxation specialists**

across all sectors (public, private, NFP)

### **Accountants and Lawyers**

working for or advising SMEs or corporates

### **Business leaders, owners, directors and consultants**

with an interest in tax

### **Newcomers to the profession**

who are wanting to learn and grow their networks

### **Anyone with an interest**

in the latest issues impacting businesses locally and globally

## Why attend?

**Learn** Up to 20 CPD hours on offer

**Discover** Hear from the most respected voices in tax

**Network** Three dedicated functions form part of the Summit

**Relax** Take a break and enjoy a pre – or post-Summit tour in urban Melbourne

# Highlights

70<sup>+</sup>

speakers

40<sup>+</sup>

sessions

20

CPD hours

3

days

## The brightest minds in tax

Take this unique opportunity to connect in person with experts and peers from across the tax profession. Explore different perspectives, investigate recent developments and unpack the impact of ideas new and old, in the company of Australia's most talented practitioners.

## Thought-provoking technical program

The Tax Summit encompasses the wide and varied experiences and constantly shifting environment of tax professionals and is designed for all those working in the profession. There's always something new to learn and as we set out to forge the future of tax, the technical program provides the insights, tips and ideas you'll need in your tax toolkit. Tailor your experience during the event to suit your areas of interest with seven specialised streams to choose from.

## See you at The Summit

Some things are just better in person. Connecting and collaborating with colleagues old and new is one of them. Network with practitioners from all corners of the tax profession during the event. Bring the team along via one of our flexible employer ticket options or reward them with a great night out amongst peers at our Gala Dinner celebrating our community.

## Destination Melbourne

We are thrilled to bring The Tax Summit back to Melbourne. Take the chance to explore all this great city has to offer, from laneway cafés, world class restaurants and shopping, to galleries, theatres and museums. Extend your stay and explore the many beautiful regions of Victoria including Gippsland, Yarra Valley and the Great Ocean Road.



### Learn

Hear from leading tax thought leaders



### Shape

Contribute to the direction of tax in Australia










### Connect

Network with peers



# Program

SME	Corporate	Tax Disputes	Indirect Tax	Next Generation	Ethics	Hot Topics
 <p>Join leading tax experts for in-depth sessions on trusts, estate planning, Division 7A, superannuation and more. Tailored for SME advisers, sole practitioners, mid-tier partners, lawyers, barristers, academics and government professionals.</p>	 <p>A cutting-edge tax technical stream delivered by Big 4 firms, legal experts, and regulators, diving into key issues like M&amp;A, residency, and demergers. Perfect for Big-4, ATO leaders, top-tier lawyers, barristers, and heads of tax from ASX 200 companies.</p>	 <p>Navigate the sharp end of tax – featuring expert insights on managing disputes, litigation strategies, and practical tips and traps when conflicts arise. Aimed at sole and SME practitioners, tax controversy specialists, lawyers, barristers, and in-house tax teams facing ATO scrutiny.</p>	 <p>Stay ahead of the curve and tackle contemporary issues in stamp duty, the rough edges of GST, and payroll tax in the gig economy with the Indirect Tax stream. Essential for advisers, in-house teams, and legal professionals navigating this fast-evolving space.</p>	 <p>Designed for tomorrow's top tax professionals, this stream delivers practical insights and aspirational guidance to help new entrants build strong foundations for a successful tax career. Perfect for those in need of a refresher or accounting and legal firm staff up to manager level, as well as early-career industry representatives.</p>	 <p>A stream dedicated to tackling real-world dilemmas facing today's tax professionals, offering practical guidance on navigating family breakdowns, as well as exploring the ethical challenges of AI, data, and digital responsibility. A must for advisers committed to integrity in a rapidly changing landscape.</p>	 <p>A dynamic tax technical stream for all Summit attendees. Explore emerging issues and challenges shaping the profession. Hear about the latest case update, with sessions on ATO debt, anti-money laundering and LPP, tariffs and Trump.</p>











# Pre-event & Day 1 ▪ Wed, 3 Sept 2025







## Pre-event

**Session 1:** Pre-recorded: How to practically implement AI in your firm - Adrian Cartland, Cartland Law







## Day 1 ▪ Wednesday 3 September

From 9:00am	Registration			
10:00–10:30am	Session 2: Official welcome and President's address – Tim Sandow, CTA, President, The Tax Institute			
10:30–11:30am	Session 3: Justice Hill Memorial Lecture – Peter Walmsley, Deputy Chief Tax Counsel, Australian Taxation Office			
11:30–12:00pm	Morning tea			
	SME 		Corporate 	
12:00–1:00pm	Session 4.1: Intergenerational change – Trusts		Session 4.4: Pillar 2 in a shifting global landscape	
1:00–2:00pm	Lunch			
	SME 	Tax Disputes 	Next Generation 	Corporate 
2:00–3:00pm	Session 5.1: Australian beneficiaries of foreign trusts	Session 5.2: Tips and traps when a dispute emerges	Session 5.3: When is something a revenue account – Revenue vs Capital	Session 5.4: Diverted Profits Tax in practice
3:00–3:30pm	Afternoon tea			
3:30–4:30pm	Session 6.1: Part IVA and PSI – Anti-avoidance essentials	Session 6.2: Key considerations in deciding whether to litigate a tax dispute	Session 6.3: Interpretation and you	Session 6.4: Intangibles in transition
	SME 		Corporate 	
4:30–5:30pm	Session 7.1: What's on the radar for SMEs		Session 7.4: What's on the ATO radar for Corporates	
5:30–7:30pm	Welcome Reception, Aerial, South Wharf			

# Day 2 ▪ Thu, 4 Sept 2025

8:30–9:15am	Session 8: Recent and emerging developments shaping our tax system			
9:15–10:00am	Session 9: Commissioner’s address – Rob Heferen, Commissioner of Taxation, Australian Taxation Office			
10:00–10:30am	Morning tea			
	SME 	Indirect Tax 	Hot Topics 	Corporate 
10:30–11:30am	Session 10.1: Dealing with loans and UPEs in estate planning	Session 10.2: Contemporary issues with stamp duty	Session 10.3: Legal Professional Privilege – New frontiers and emerging issues	Session 10.4: Thin capitalisation – From legislation to application
11:30am–12:30pm	Session 11.1: My client has tax debts – Is insolvency or bankruptcy their best or only option	Session 11.2: GST – The rough edges	Session 11.3: The evolving role of Tax Practitioners – Code, breaches and compliance	Session 11.4: Impacts and practical issues arising from debt deduction creation rules
12:30–2:00pm	Lunch and Session 12: Update from the Tax Ombudsman – Ruth Owen CBE, Inspector-General of Taxation and Taxation Ombudsman (session commencing at 1:00pm)			
2:00–3:00pm	Session 13.1: Navigating the maze of losses	Session 13.2: State taxes in the gig economy	Session 13.3: Cases update	Session 13.4: Shaping the future of global tax – Heads of Tax insights
3:00–3:30pm	Afternoon tea			
	SME 	Corporate 		
3:30–4:30pm	Session 14.1: Deep dive on ATO application of 109T		Session 14.4: Hybrids in focus	
4:30–5:30pm	Session 15.1: How big-end rules are reshaping SME compliance		Session 15.4: Future proofing your transfer pricing	
5:30pm	Delegate free time			
7:00pm	Tax Summit Gala Dinner			

# Day 3 ▪ Fri, 5 Sept 2025

8:30–9:30am	Session 16: VIP presentation – Danielle Wood, Chair, Productivity Commission			
	SME 	Ethics 	Hot Topics 	Corporate 
9:30–10:30am	Session 17.1: CGT roll-overs – Critical knowledge for advisers	Session 17.2: Tax, ethics, and family breakdowns – Practical guidance for advisers	Session 17.3: Managing taxpayer debt – An ATO perspective	Session 17.4: Australia's economic outlook in a shifting global landscape
10:30–11:00am	Morning tea			
11:00am–12:00pm	Session 18.1: Demystifying areas of widespread misunderstanding	Session 18.2: Navigating ethics in the digital age – AI, data, and professional responsibility	Session 18.3: Taxes, tariffs and Trump	Session 18.4: The mutual agreement procedure (MAP) and transfer pricing
	SME 		Corporate 	
12:00–1:00pm	Session 19.1: Shaping SMSF strategies – Big changes advisers need to know		Session 19.4: M&A tax update	
1:00–2:30pm	Session 20: Closing keynote – Seated lunch			



# Technical streams



# Keynotes

## **Session 1 - Pre-recorded: How to practically implement AI in your firm**

**Speaker:** Adrian Cartland, Cartland Law

This session draws on real-world systems and workflows to show how AI can be deployed effectively, securely, and profitably in a professional services environment.

This session will cover:

- How to build your own Retrieval Augmented Generation system that consistently produces work above the level of base models and eliminates hallucinations.
- How I used AI to complete four years of accounts for 30 entities in just three weeks.
- Managing privacy, privilege, and “shadow AI” use in your firm to ensure compliance while fostering safe innovation.
- Why AI can reduce costs for clients, expand demand for legal services, and simultaneously increase the need for skilled junior staff.
- How to teach your staff to use AI effectively and why “play” is an important element to incorporate into firm culture.

Attendees will leave with clear, practical steps to implement AI in their own firms,

improving productivity and maintaining compliance with professional and ethical standards.

## **Session 2: Official welcome and President’s address**

**Speaker:** Tim Sandow, CTA, President, The Tax Institute

## **Session 3: Justice Hill Memorial Lecture**

**Speaker:** Peter Walmsley, Deputy Chief Tax Counsel, Australian Taxation Office

## **Session 8: Recent and emerging developments shaping our tax system**

**Panellists:** Philip Broderick, CTA, Sladen Legal, Shaun Cartoon, FTI, Arnold Bloch Leibler and Premila Roe, CTA, BHP Group Limited

**Facilitator:** Julie Abdalla, FTI, The Tax Institute

This session will explore the latest shifts and upcoming trends in tax policy, legislation, and administration – and what they mean for professionals navigating a rapidly evolving system.

## **Session 9: Commissioner’s address**

**Speaker:** Rob Heferen, Commissioner of Taxation, Registrar of the Australian Business Register, Australian Business Registry Services, and Register of Foreign Ownership of Australian Assets

In this annual address, Commissioner Heferen will discuss the current tax landscape and what’s on his radar.

## **Session 12: Update from the Tax Ombudsman**

**Speaker:** Ruth Owen CBE, Inspector-General of Taxation and Taxation Ombudsman

## **Session 16: VIP Presentation**

**Speaker:** Danielle Wood, Chair, Productivity Commission

Hear first-hand from a key and influential decision maker.

## **Session 20: Closing keynote**

Relax, sit back and enjoy a plated lunch and some inspiration thoughts from our closing presenter.



## Session 4.1: Intergenerational change – Trusts

**Speaker:** Linda Tapiolas, CTA, Cooper Grace Ward

Trusts play a key role in intergenerational wealth transfer. With the ATO identifying succession planning as one of their targeted focus areas, it's more important than ever that succession planning for trusts is carried out with a clear strategy and understanding of all the issues required to be considered.

This session will include:

- A review of trust deed provisions
- Consider whether business or investment activities will continue or change, and identify any issues to resolve before succession
- Assess opportunities to simplify or tidy up the trust structure
- Factor in practical considerations such as family dynamics and whether successors can work together
- Evaluate key tax implications, required documentation, and whether the trust remains the appropriate structure; and
- Consider vesting the trust as an alternative, with its pros and cons.

## Session 5.1: Australian beneficiaries of foreign trusts

**Speakers:** Frank Hinoporos, CTA, Hall & Wilcox, George Psarrakos, CTA, Mutual Trust

With our ever-expanding family networks, it is not uncommon for clients to be a beneficiary of a Foreign Trust or Foreign Deceased Estate.

This session will look at:

- Recent developments affecting cross-border family groups
- Australian tax implications of strategic, operational and investment decisions
- Transfer of wealth across borders and across family generations
- Documentation and other considerations for families and their associated foreign trust structures; and
- Section 99B and related developments.

## Session 6.1: Part IVA and PSI – Anti-avoidance essentials

**Speaker:** Andrew Henshaw, CTA, Velocity Legal

In 2024 the ATO released its draft ruling (PCG 2024/D2) on the application of Part IVA to alienation or splitting of personal services income arrangement. PCG 2024/D3 represents a risk-based approach to PSI.

When can Part IVA truly apply to PSI arrangements?

This session will consider:

- The old cases on PSI and anti-avoidance
- More recent cases on Part IVA generally, such as *Minerva Financial Group Pty Ltd v Commissioner of Taxation* [2024] FCAFC] 28; and
- How does the identification of the scheme and the objective factors in section 177D(2) operate in a PSI context.

## Session 7.1: What's on the radar for SMEs

**Panellists:** Neil Brydges, CTA, Sladen Legal, Scott McGill, CTA, Pitcher Partners, Jemma Sanderson, CTA, Cooper Partners Financial Services

**Facilitator:** Loreena Gillon, CTA, Arithmos Chartered Accountants (WA)

Anticipating and identifying potential problems before they arise is invaluable to SME practices.

Our panel of experienced practitioners will discuss some emerging issues they are coming across in the SME market.

The discussion will consider:

- How to identify the problem
- Where is the mischief; and
- Mitigation strategies.

### Session 10.1: Dealing with loans and UPEs in estate planning

**Speaker:** Caitlin Ashworth, CTA, CCK Lawyers

As Australia continues with the largest generational wealth transfer in history, one category of assets which can sometimes be overlooked are UPEs and beneficiary loans. Failing to adequately deal with UPEs and beneficiary loans within the estate plan can lead to disastrous (unintended) consequences.

- What are the implications of UPEs and loans being “forgotten” during a client’s estate planning
- Identifying outstanding loans and UPEs and the existing arrangements for dealing with these (if any)
- What options are there for dealing with UPEs, loans as part of the estate plan, what tax issues and consequences arise and recommended strategies
- What non-tax issues ought to be considered; and
- Is dealing with UPEs and loans before death a better option?

### Session 11.1: My client has tax debts – Is insolvency or bankruptcy their best or only option

**Speaker:** Megan Bishop, Piper Alderman

As pursuit of tax debts remain high on the ATO’s list of priorities and with the full range of enforcement powers being exercised, understanding clients risks and options when it comes to tax debts is as critical as ever. This session will discuss:

- The ATO’s current attitude and policies around debt recovery
- The tools within the ATO’s armoury and how they are being deployed
- The problems that insolvency/ bankruptcy do resolve – and those which they do not; and
- The options available to taxpayers – and pros and cons of each – including:
  - Payment arrangements
  - Director penalty notices
  - Statutory demands
  - Statements of claim

### Session 13.1: Navigating the maze of losses

**Speaker:** Matthew McKee, FTI, Brown Wright Stein Lawyers

Losses are a complex and often misunderstood area of tax, with different rules and considerations depending on the entity involved. This session will unpack the current rules and recent developments for managing and utilising losses across various structures, including individuals, companies, and partnerships. Attendees will gain a clearer understanding of:

This session will consider:

- The conditions under which losses can be claimed and carried forward
- The impact of non-commercial loss rules for individuals
- The continuity of ownership and same business tests for companies
- How partnership losses are treated and distributed; and
- Practical considerations and common pitfalls to avoid.

### Session 14.1: Deep dive on ATO application of 109T

**Speaker:** John Ioannou, CTA, Macpherson Kelley

While Division 7A has been with us for almost 30 years, with one round of substantive changes in recent history (2009) it continues to catch many practitioners off guard. Run of the mill issues continue unabated, but some of the more embedded complexities are starting to surface in taxpayer reviews and audits. These include:

- Offshore private companies
- Starting points for 109T (actual dividends, protected payments and no distributable surplus companies)
- Who is the ‘reasonable person’
- How do you actually offset in practice; and
- 109V, W and ZC in practice.



## SME continued

### Session 15.1: How big-end rules are reshaping SME compliance

**Speaker:** Neil Brydges, CTA, Sladen Legal

Discover how debt deduction creation, thin capitalisation, and transfer pricing rules, once reserved for corporates, now target high net worth private groups. Learn to navigate ATO's Next 5000 and Top 500 reviews, meet public group compliance standards, and shape proactive strategies. Address ATO hot topics, data-driven scrutiny, and resource challenges to stay ahead in this evolving tax landscape. Equip yourself with practical tools to prepare clients for inevitable audits, mitigate penalty risks, and adapt to global tax trends influencing Australia's HNW space.



### Session 17.1: CGT roll-overs – Critical knowledge for advisers

**Speaker:** Todd Want, CTA, William Buck

Gain practical insights into CGT roll-over strategies and compliance essentials.

This session will provide:

- An overview of essential CGT roll-over provisions, covering restructures and scrip-for-scrip transactions
- Insights into compliance nuances, drawing on recent judicial perspectives (*AusNet Services Limited v FCT*)
- Exploration of ATO's approach to complex roll-over arrangements
- Actionable tips for managing roll-over risks and client scenarios
- A snapshot of emerging roll-over considerations in today's economy; and
- Tools for advisers to navigate CGT roll-over intricacies with confidence.

### Session 18.1: Demystifying areas of widespread misunderstanding

**Speaker:** Fiona Dillon, CTA, Australian Taxation Office

**Facilitator:** Leanne Connor, CTA, WGC Business Advisors

Some tax rules are misunderstood so often, they've become traps waiting to spring. This session cuts through the confusion and challenges the assumptions, zeroing in on the provisions that catch even seasoned professionals off guard.

### Session 19.1: Shaping SMSF strategies – Big changes advisers need to know

**Speaker:** Jemma Sanderson, CTA, Cooper Partners Financial Services

Master the latest game-changers for SMSF advice in this must-know update for accountants and lawyers. We'll dissect three major shifts including:

- Current areas of ATO compliance activity that was also prevalent in the recent Merchant case
- Non-arm's length income (NALI) and expense (NALE) rules hitting related-party dealings; and
- The highly criticised Division 296 tax targeting high-balance funds.

Designed for professionals guiding business owners, this session offers clear insights into navigating these complexities—think adjusting investment structures additional asset acquisition considerations and planning for new tax burdens. Practical examples and strategies will shape cutting-edge advice to keep your clients' SMSFs compliant and tax-efficient in a shifting regulatory world.



# Tax Disputes

## Session 5.2: Tips and traps when a dispute emerges

**Speakers:** Kaitilin Lowdon, ATI, Sladen Legal, Gareth Redenbach, Victorian Bar

The ATO's assurance and risk-based reviews or audits are no longer anomalies but an inevitable part of the tax journey. They should be expected. This session will take you through tips and traps of ATO reviews and audits, highlighting the common challenges encountered, and providing practical strategies to navigate the complexities, including:

- Facts and evidence and burden of proof
- Assessments and period of review
- Penalties
- Voluntary disclosures
- Preventing disasters; and
- External review considerations.

## Session 6.2: Key considerations in deciding whether to litigate a tax dispute

**Speakers:** The Hon. Jennifer Davies KC, Victorian Bar, Luke Imbriano, FTI, Corrs Chambers Westgarth

Recent high-profile tax cases, including *PepsiCo*, *Oracle*, *Bendel*, and *Ausnet*, have been heard before the High Court and Federal Court of Australia, shedding light on significant legal principles and providing valuable lessons for future tax litigation. These cases highlight crucial considerations in determining when a tax dispute should be pursued in court. Correctly addressing these issues is essential under Part IVC of the TAA 1953.

This session will explore:

- What are the critical considerations for both taxpayers and the Commissioner in deciding whether to take a tax dispute to court?
- A practical guide on when and how to litigate a tax dispute, covering the appropriate forum, administrative processes, and key stakeholders involved
- What insights can be drawn from the outcomes of cases such as *PepsiCo*, *Oracle*, *Bendel*, and *Ausnet*; and
- Once a decision is handed down and what factors should both taxpayers and the ATO consider when deciding whether to appeal?



# Next Generation

## Session 5.3: When is something a revenue account — Revenue vs capital

**Speaker:** Chris Peadon, FTI, New Chambers

Revenue or capital? It's an age-old question that is raised in client matters across a wide range of industries. This session will discuss how you navigate the capital vs revenue distinction for your clients, amid so much long-standing uncertainty around the topic.

## Session 6.3: Interpretation and you

**Speaker:** Gordon Brysland, Australian Taxation Office

This session is about understanding our interpretation system and how it works. It's not rocket-science nor is it arcane mystery. Our 'modern approach' is an objective, logical and accessible 'system' based on the 'text > context > purpose > text' pathway.

The emphasis in this session will be on key principles which run the system, how to navigate the system with confidence, and how to avoid rookie errors. Things covered will include the importance of context, the obligation to seek coherence, and the centrality of legislative purpose.

This session will provide a template within which to interpret tax laws, discuss some common problems, direct you to sources of assistance, and (if time permits) touch on AI issues.



# Indirect Tax

## Session 10.2: Contemporary issues with stamp duty

**Speaker:** Geoff Mann, CTA, Deloitte

Stamp duty remains a complex and evolving area of state taxes, with recent reforms and ongoing legal challenges continuing to reshape the landscape.

This session will explore where we are now and what's on the horizon, including:

- An overview of the current state of play for stamp duty
- A summary of key legislative changes and policy developments in recent years
- A look at recent constitutional challenges and their implications for state taxes; and
- An exploration of ongoing problem areas, including land tenure, corporate reconstructions, and landholder aggregation and valuation.

## Session 11.2: GST – The rough edges

**Speakers:** Scott McGill, CTA, Pitcher Partners, Andrew Sommer, CTA, Clayton Utz

GST is largely devoid of legislative reform, stymied by the intergovernmental agreements that allowed it to be created. The ATO is being pressured to generate more revenue from the unreformed tax. What are the rough edges on which the ATO can focus?

- Nexus for apportionment
- Margin scheme and substantiation
- Retirement villages, commercial residential premises and housing development
- The complexities of Division 93 in practice
- Enterprise as a gateway to the GST system; and
- Pushing the edges of Division 165.

This presentation will look at the risk areas for taxpayers with practical advice on how to handle ATO engagement on these issues.

## Session 13.2: State taxes in the gig economy

**Speaker:** Andrew Healer, Victorian Bar

Indirect taxes can have a significant impact on the profitability of businesses operating in the gig economy, from payroll tax on inner city Uber dumping deliveries to FBT on travel to remote regions by FIFO / DIDO employees, and those raising a bit of cash through Airbnb.

This session highlights recent developments in administration of these taxes.





# Ethics

## Session 17.2: Tax, ethics, and family breakdowns – Practical guidance for advisers

**Speakers:** Thomas Caldow, Grant Thornton, Tim Gough, Kennedy Partners, Nick Love, Grant Thornton

This session explores the ethical and tax-related challenges advisers face when clients navigate family breakdowns, offering actionable strategies to uphold professional standards.

This session will discuss:

- Ethical considerations when acting for clients in family disputes, including dual representation risks
- Practical steps for navigating tax obligations during family court proceedings
- Managing conflicts of interest under Tax Practitioners Board (TPB) discretion guidelines
- Role of forensic accounting in family law cases ; and
- Guidance on collaborating with family lawyers and assisting with court orders.

## Session 18.2: Navigating ethics in the digital age – AI, data, and professional responsibility

**Speaker:** Tracey Dunn, EY

This session examines the ethical challenges lawyers and accountants face when integrating AI and digital tools into their practices.

Explore real-world ethical dilemmas in this session tailored for lawyers and accountants. Topics include:

- Data privacy risks with digital platforms and AI tools
- Managing bias in AI-driven decisions for audits and advice
- Ensuring transparency when using automated systems
- Maintaining client confidentiality in cloud-based workflows; and
- Addressing conflicts of interest for various types of partnerships.

This session will feature case studies bringing these issues to life, alongside practical strategies drawn from professional codes and current guidelines.





# Hot Topics

## Session 10.3: Legal Professional Privilege – New frontiers and emerging issues

**Speaker:** Amber Agustin, FTI, Gadens

This session will deal with new and emerging challenges for tax lawyers advising on legal professional privilege in the context of tax cases. In particular, the session will consider:

- From Technology Assisted Review to AI – challenges for LPP from new and emerging technologies
- Voluntary production and waiver – approaches and consequences
- Reflections on the Brazil direction; and
- The joint Attorney-General/Treasury Department's *Review of the Use of Legal Professional Privilege in Commonwealth Investigations*.

## Session 11.3: The evolving role of Tax Practitioners – Code, breaches and compliance

**Speaker:** Arthur Athanasiou, CTA (Life), AGA Legal

This session will examine recent developments that expand the obligations of tax and BAS agents, focusing on updates to the Code of

Professional Conduct and new breach reporting duties, alongside emerging compliance requirements such as anti-money laundering.

This session will provide key takeaways for practitioners around what has changed and what they need to know, and using practical examples will explore:

- An overview of changes to the Code and interpretations by the Tax Practitioners Board
- Discussion of contentious Code updates, including false or misleading statements and the duty to keep clients informed
- Understanding breach reporting obligations and how to assess whether a breach is “significant” or causes (or is likely to cause) “material” loss or damage
- Practical guidance on identifying when breach self-reporting is; and
- Evaluating whether documentation from a new client’s previous accountant may trigger breach reporting, including unaddressed Division 7A or Section 100A issues and unjustified inflated tax claims.

## Session 13.3: Cases update

**Speaker:** Andrew Spierings, ATI, Victorian Bar

This session will discuss the key implications flowing from recent judgments handed down by the relevant Courts of Australia.

## Session 17.3: Managing taxpayer debt – An ATO perspective

**Speaker:** Anna Longley, Australian Taxation Office

The ATO aims to foster payment on time and prevent future debt, engaging early with taxpayers to ensure they understand their payment obligations and supporting those who need it.

During this session, our speaker will address the ATO’s approach to payment, including the focus on GST, PAYGW and super guarantee charge debt and taxpayers who deliberately avoid engaging with the ATO.

The session will also cover the support available for those who cannot lodge or pay on time.

## Session 18.3: Taxes, tariffs and Trump

**Speakers:** Rashtin Fazal, Grant Thornton, Richard Nutt, Grant Thornton

The new United States Trump Administration has recently announced a wave of new tariffs and tax reform measures.

This session will cover:

- Current state of play on US tariffs and the impact to Australian supply chains and any response.
- Other announced US corporate income tax reforms; and
- Implications of the US announcements in relation to BEPS Pillar 2 for Australia.





# Corporate

## Session 4.4: Pillar 2 in a shifting global landscape

**Speakers:** Michael Anderson, BDO, Catherine Dean, CTA, BDO

Nearly 12 months into Pillar 2's implementation, multinationals are navigating unprecedented complexity, while geopolitical shifts are testing the durability of the global tax consensus. This session examines where things stand – and where they may be heading.

- Practical implementation challenges with Pillar 2 – data gaps, system readiness, and interaction with existing tax rules
- Australia's first year under Pillar 2: key lessons, common pain points, and emerging areas of ATO focus
- The impact of a potential Trump administration on Pillar 1 and 2 – disruption or derailment?
- What a US withdrawal from Pillar 2 could mean for global coherence and unilateral responses; and
- Approaching the one-year mark – what compliance looks like now versus what was expected.

## Session 5.4: Diverted Profits Tax in practice

**Speakers:** Eugene Wheelahan KC, FTI, Victorian Bar, Angela Wood, CTA, Clayton Utz

This session will explore critical questions around the taxation of cross-border payments and beneficial ownership. Focusing on the DPT provisions introduced under Part IVA, this session will examine:

- The legal interpretation of key DPT concepts
- The interaction between DPT and Australia's general anti-avoidance framework – Part IVA; and
- Procedural and strategic considerations for multinational groups under DPT scrutiny.

## Session 6.4: Intangibles in transition

**Speakers:** Chris Ferguson, Deloitte, Rachel Sciascia, Deloitte

The focus on intangibles continues, with significant developments in case law and ATO guidance products.

In this session we will discuss these developments and provide insights into the practical application and the impacts and ramifications for all organisations.

## Session 7.4: What's on the ATO radar for Corporates

**Speaker:** Jonathan Tang, Australian Taxation Office

The ATO's approach to corporate taxation continues to be a key focus area.

During this session, the ATO will provide an update on its approach to corporate taxpayers including its Top 100 and Top 1000 programs, its broader compliance program for the large market population and the key issues that the ATO is prioritising.

## Session 10.4: Thin capitalisation – From legislation to application

**Speaker:** Kai-Chen Lamb, King & Wood Mallesons

The new thin capitalisation rules are now in force with organisations needing to consider and apply the rules. The ATO is also releasing guidance on key matters relevant to the new rules. In this session, we will provide insights into the new rules and practical issues which are emerging for many organisations in the context of property and infrastructure investments in Australia, focusing on:

- The 'associate entity' concept, including when entities may be regarded as 'associate entities' for the purposes of these rules, and how these rules differ depending on what area of these rules the distinction is being applied in the context of; and
- Applying the 'third party debt test' in practice, and the challenges in relying on the conduit financing rule, taking into account the terms of the legislation and the ATO guidance available.



## Corporate continued

### Session 11.4: Impacts and practical issues arising from the debt deduction creation rules

**Speakers:** James Alsop, KPMG, Justin Orders, KPMG

With effect from 1 July 2024, the new 'thin cap' regime is complemented by the debt deduction creation rules (DDCR) which target debt deductions relating to certain related party arrangements. The DDCR is complex with broad application. It contains a specific anti-avoidance rule. For many taxpayers, there is a need to revisit historic arrangements and trace funds. Evidence is required to prove that the DDCR does not apply.

This session will walk through the scope of the DDCR, its interaction with other measures and the Commissioner's administrative approach.

### Session 13.4: Shaping the future of global tax – Heads of Tax insights

**Panellists:** Bill Barton, FTI, BP, Shashi Sivayoganathan, FTI, Transurban, Jessica Williams, Sportsbet

**Facilitator:** Dioni Perera, FTI, EY

This session brings together top tax executives to share their firsthand experiences and strategic insights on the challenges and opportunities shaping the future of global taxation.

Our expert panel will explore:

- The evolving role of the Head of Tax in today's complex regulatory and business landscape
- Key trends in international tax, including BEPS 2.0, digital tax reform, and the increasing focus on environmental, social, and governance (ESG) factors
- Strategies for managing tax risk and compliance in an era of rapid regulatory change and heightened scrutiny
- How global tax teams are adapting to remote work, automation, and digitalisation in tax processes; and
- Future-proofing tax strategy: Aligning with corporate objectives while navigating new global tax frameworks.

### Session 14.4: Hybrids in focus

**Speaker:** Jayde Thompson, Alvarez & Marsal

Hybrids remain a key area of scrutiny for tax authorities, especially for large multinationals. This session will unpack the ATO's documentation expectations, common pitfalls with hybrids, and how these issues intersect with the evolving Pillar 2 framework.

This session will look at:

- ATO's increasing demands on robust hybrid documentation and disclosure, particularly for large multinationals
- Common challenges and compliance risks arising from hybrid mismatch arrangements
- The interplay between hybrid mismatches and Pillar 2's global minimum tax rules; and
- Practical strategies for managing hybrid risks and aligning with evolving international standards.

### Session 15.4: Future proofing your transfer pricing

**Speaker:** Lorena Sosa, ATI, PwC Australia

This session will explore recent developments, highlight key cases, and consider the broader role of transfer pricing in corporate tax strategy, including:

- Recent and anticipated ATO guidance on transfer pricing exemptions, including potential updates leading into September
- The integration of transfer pricing considerations into broader tax governance frameworks
- Public Country-by-Country (CbC) reporting and its implications for transparency and compliance
- Key cases on the horizon; and
- The pervasive role of transfer pricing in corporate tax and capital management decisions, and reflections on where the discussion is heading.



## Corporate continued

### Session 17.4: Australia's economic outlook in a shifting global landscape

**Speaker:** Johnathan McMenamin, Barrenjoey

Global markets are reacting to shifts in US economic and trade policy, Australia is not immune to this elevated uncertainty. For tax professionals, the intersection of geopolitics, fiscal pressure, and protectionist trade measures could see policy makers use the tax system as a way of supporting local economies.

This session provides a timely economic and policy update tailored to the tax profession, with a spotlight on:

- US trade and tariff policy, and its implications for multinational supply chains
- Australian macroeconomic trends – interest rates, inflation, and the importance of global growth – and their influence on fiscal policy and tax policy
- How policy monetary and fiscal policy, including Australia's tax system, is currently driving the economic growth; and
- How countries may respond fiscally to renewed trade tensions.

### Session 18.4: The mutual agreement procedure (MAP) and transfer pricing

**Speaker:** Michael Jenkins, CTA, EY

This session will cover the practical operation of the MAP process with a focus on transfer pricing. The MAP Article in Australia's double tax treaties provides the basis for government-to-government dispute prevention and dispute resolution framework that largely sits outside jurisdictional laws. Specific matters covered will include:

- The intended operation of the MAP Article
- The impact of the OECD's BEPS Project and the Multilateral Instrument (MLI)
- MAP and the courts (including the *Oracle* case); and
- The ATO's approach to MAP and APAs.

### Session 19.4: M&A tax update

**Speaker:** Stephen Chen, CTA, MinterEllison, Adrian Varrasso, ATI, MinterEllison

This session explores the evolving landscape for foreign investment into Australia, covering tax, legal, and regulatory considerations with a focus on recent developments impacting renewable energy, land use, and private capital flows and will discuss:

- Inbound investment trends, including growth in renewables, land development, hydrogen, and private equity
- CGT implications for foreign investors, with a focus on TARP rules, recent guidance, and the impact of cases such as Newmont, YTL, and CONEX
- Distinction between revenue and capital treatment and why it matters for structuring and exit planning
- Practical challenges around foreign resident CGT withholding and key compliance considerations
- FIRB approval thresholds and sector-specific considerations, including sensitive land and infrastructure projects

- State-based foreign resident surcharge duty issues, recent litigation (especially in NSW), and implications for transaction planning; and
- Strategic considerations for combining tax, regulatory, and commercial drivers in cross-border investments into Australian assets.



# Venue



## 📍 Melbourne Convention and Exhibition Centre

The Tax Summit is returning to the impressive MCEC, a Melbourne icon and purpose-built, multi-award winning convention centre.

The city is alive with energy and innovation around every corner. At the heart of it all is the Melbourne Convention and Exhibition Centre (MCEC) – Melbourne's home of bold and world-class events. As the venue for this year's biggest tax event, MCEC offers a first-class experience in a prime riverside location. With Melbourne's buzzing restaurants, galleries, and nightlife just steps away, your Summit experience can seamlessly extend into the city itself.

Located in the vibrant South Wharf precinct, Australia's newest oldest place, it's your starting point to access nearby Southbank, the Yarra River, Melbourne's infamous laneways and first-class restaurants.



State of the art of technology



World class cuisine

5

minutes from the CBD

6

star green building

## Getting there

### By air or road

**Flights:** Qantas, Virgin Australia and Jetstar operate services to Melbourne. Delegates are advised to book early to secure best pricing and understand cancellation policy for travel arrangements.

**By car or taxi:** From Melbourne Airport, it is approximately 30 minutes travel time.

### Melbourne weather

When visiting Melbourne in September, you can expect very pleasant days with average maximum daytime temperature of around 20°C. For convenience, visit [www.visitvictoria.com](http://www.visitvictoria.com) for information on getting around Melbourne and surrounding areas.

Book your trip today by visiting [taxinstitute.com.au/tax-summit](http://taxinstitute.com.au/tax-summit).

# Places to stay

Our accommodation partner Conference National has negotiated discounted accommodation for delegates travelling to Melbourne.

Book your accommodation today by visiting: [conferencenational.com.au/tts-2025](https://conferencenational.com.au/tts-2025)



★★★★★

**Novotel Melbourne  
South Wharf**  
2 min walk to MCEC



★★★★★

**Pan Pacific Melbourne**  
5 min walk to MCEC



★★★★★

**Crown Metropol**  
10 min walk to MCEC

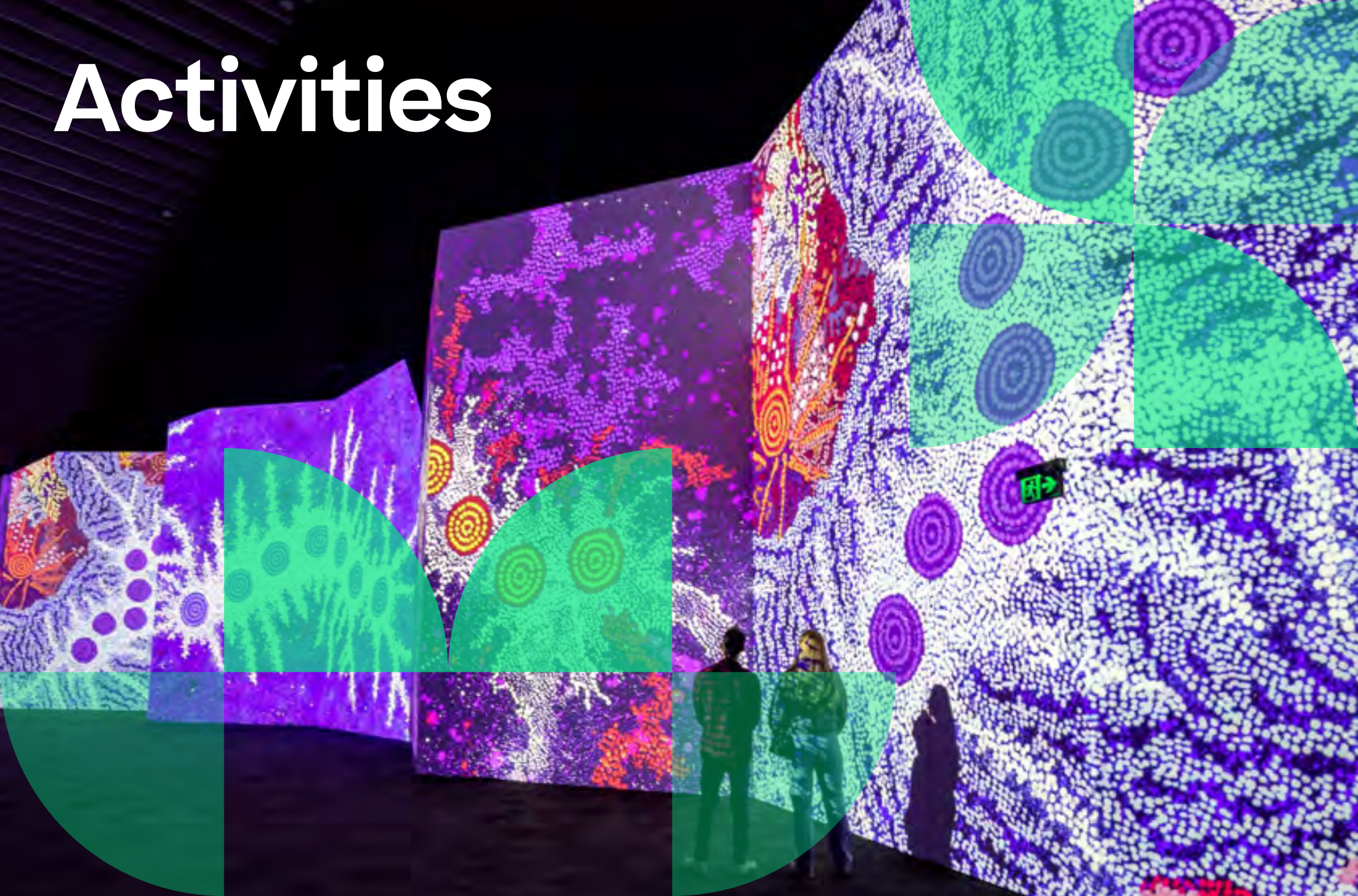


★★★★★

**Crowne Plaza Melbourne**  
12 min walk to MCEC



# Activities







# Included networking activities

Our biggest networking opportunities are included in your registration

## Welcome Reception

 Aerial South Wharf

Join us for cocktails, canapes, and fun as you savour panoramic views of Melbourne's skyline and the glistening Yarra River. 180-degree views span the Bolte Bridge, Docklands and Melbourne CBD skyline, showcasing stunning sunsets and night lights.

Date Wednesday, 3 September 2025

Time 5:30 – 7:30pm

Price Included in the full registration fee.  
Additional tickets \$80 per person.

Dress Business or business casual

Proudly sponsored by



## The Tax Summit Gala Dinner

 Melbourne Convention and Exhibition Centre

Join us for an unforgettable evening of glamour. Frock up and unwind at our much-loved, once a year occasion: The Tax Summit Gala Dinner. With good food, good drinks and good company in abundance, this lavish event promises a good time!

Date Thursday, 4 September 2025

Time 7:00pm onwards

Price Included in the full registration fee.  
Additional tickets \$175 per person.

Theme Old Hollywood

Dress Black tie / Cocktail

# Recommendations

## Within 5 minutes of MCEC

There's so much to see and do while in Melbourne.



### **Stroll the South Wharf Promenade**

South Wharf Promenade is Melbourne's hottest "go-to" location for amazing food, sensational shopping, bars, walks and wonderful views of Melbourne. Take a leisurely stroll along the Promenade, enjoy the views, dine at one of the award-winning restaurants, cafés or bars or shop in DFO.



### **Award winning cuisine**

Eat and drink your way through Melbourne. Stake out the city to find everything from cosy coffee dens, rooftop bars and modern cuisine. Chat with locals over craft beers and a steak at an inner-city pub, settle in for an indulgent eight-course degustation menu, or choose a direction and hit the road for a weekend of indulgence.



### **Immerse yourself at LUME Melbourne**

Ranking among the most-loved and most-visited attractions in Australia's capital of arts and culture, THE LUME Melbourne immerses visitors into the world's finest art at a truly jaw-dropping scale. An expansive 3,000 square metre, four-storey high space, THE LUME Melbourne is the first permanent space in the Southern Hemisphere of its kind.

**Recommendations** continued

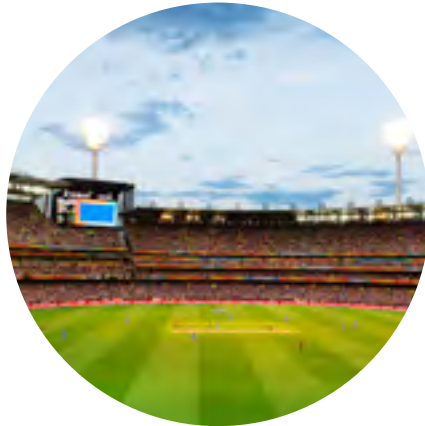
## Explore the city



### Eat and drink

Melbourne boasts some of the best food and drink options around the entire country. World-class bakeries like the famous Lune, cosy cafés and wine bars galore, Melbourne has it all.

[Find out more ►](#)



### Catch a game at the MCG

Victoria is a sports-mad state that punches above its weight in the big-event stakes. It's quite possibly the best place in the world to be a sporting spectator or a footy fan. September is finals season – catch the qualifying and eliminating finals.

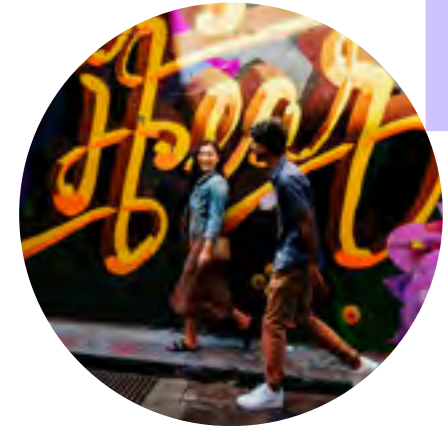
[Find out more ►](#)



### Dive into culture

Indulge in Victoria's ever-expanding arts and culture scene in venues across the state. From theatre shows and live music to comedy clubs, museums, galleries and festivals, Victoria is a state of the arts.

[Find out more ►](#)



### Take a tour

Let someone else do the hard work for you and take a tour. Whether you like walking, motorcycles, boat trips or dumplings, there's a tour for you in Melbourne.

[Find out more ►](#)



**Recommendations** continued

## If you have a day to spare



### Take a road trip

Travel across Victoria and experience the region's stunning landscapes, historic towns and renowned food and wine. The state's compact size means you can travel from high in the mountains to the rugged southern coast and back to the city in just a short space of time. So hit the road on a touring route, make your own way around, or follow an itinerary and see the wonders of Victoria for yourself.

[Find out more ►](#)



### Venture outdoors

Enjoy Victoria's breathtaking scenery and diverse natural environments on an outdoor adventure. Whether you're on skis or floating high in a balloon, out on the water or hiking up a mountain, the best way to see Victoria is in the open air.

[Find out more ►](#)



### Aboriginal Victoria

Journey through Aboriginal Victoria for a traditional and contemporary experience of this ancient land. Learn more about the spiritual beliefs and unique traditions of South Eastern Australia's First People, culturally significant sites, renowned art and original crafts, and a living history which reaches back more than 60,000 years.

[Find out more ►](#)



### Take a break

Home to an abundance of natural mineral springs and ancient geothermal springs, Victoria offers a unique spa and wellbeing experience. Rejuvenate in the nutrient rich waters and indulge at boutique spa resorts, luxury accommodation and day spas. With its long spa tradition, more than 100 springs and every kind of luxury throughout the state, Victoria is the perfect place for an indulgent escape.

[Find out more ►](#)

You can't always predict  
or control the future,  
but the current moment  
belongs to you.

Tax shapes the world,  
how will you shape  
the moment?



# Event info

## Discounts



### Advance pricing

All registrations received and paid for on or before Friday, 4 July 2025 will be entitled to an advance registration discount.



### Early bird registration

All registrations received and paid on or before Friday, 1 August 2025 will be entitled to an early bird discount.

**Please note:** All registration fees do not include accommodation, hotel incidentals or transfers.



### Group discounts

Purchase four full registrations (advanced, 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)



### Employer tickets

Flexible ticket options ideal for firms wanting to send multiple employees to sessions of their choice. See page 37 for more information.

## Event Info continued

### Confirmation of registration

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

### 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 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. For the Gala Dinner, the dress code is Black Tie, theme: *Old Hollywood*.

### Continuing Professional Development (CPD)

Attendance at the conference counts for 20 hours of CPD with The Tax Institute.

### The Tax Institute's attendee hub

Following registration, delegates will receive access to The Tax Summit's virtual attendee hub. Delegates can select, swap, and change sessions, view event information, download materials (technical papers and presentations), complete survey forms, view sponsors, and more. Delegates will receive instructions on accessing the virtual attendee hub by email. All delegates are encouraged to access the platform

prior to the event. Technical papers and PowerPoint presentations will be available on the attendee hub approximately five days before the event. These materials, along with all on-demand session recordings, will be available for delegates to view and download for six months post-event.

### Networking activities

#### Welcome Reception

This year, the Welcome Reception will be held at the Aerial South Wharf. Boasting stunning panoramic views of Melbourne and the Yarra River, it is a short walk from the Melbourne Convention and Exhibition Centre, and The Tax Institute team will be on hand to provide directions.

#### Tax Summit Gala Dinner

This year, The Tax Summit Gala Dinner will be held at The Tax Summit venue, the Melbourne Convention and Exhibition Centre.

### Special dietary and accessibility requirements

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

### Cancellation policy

The Tax Institute reserves the right to alter, amend, or cancel any of the arrangements in the program. Should a face-to-face event be cancelled due to events beyond

The Tax Institute's reasonable control (e.g., acts of God, pandemics, health-related events, or government requirements), we will endeavour to transition to an online format. If there is a difference in price, a credit will be provided to delegates for future use.

It is a condition of registration that an administration fee of 20% of the registration fee will be charged for cancellations. Cancellations must be received in writing five working days before the event. No refund will be given for cancellations received within five working days of the event. A replacement attendee 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 arrivals or non-arrivals due to transport delays.

### 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).

# Register now

## Individual ticket

This full registration ticket gives you access to the full Summit experience.

### Inclusions

- ✓ Participation in the full program
- ✓ Online access to presentations and technical papers via The Tax Institute CPD app
- ✓ Welcome Reception and Gala Dinner
- ✓ Catering and refreshments during Summit hours

**Register via form**

included in this brochure

## Group booking

Purchase 4 x full registrations, get the fifth free.<sup>^</sup>

<sup>^</sup> The free fifth registration must be of equal or of less value to the four paid registrations

## Employer ticket

Flexible ticket options ideal for firms wanting to send multiple employees to sessions of their choice.

### Options\*

- Classic – Up to 6 attendees and 12 sessions
- Plus – Up to 18 attendees and 36 sessions
- Premium – Up to 30 attendees and 60 sessions

### Inclusions

- ✓ Attendees will receive access to all plenary sessions\*

\* Does not include attendance at the Seated Lunch (Session 20) on Day 3. However, this session can be selected as part of the employees session choices. Terms and Conditions apply.

**Register via form**

included in this brochure

**Save  
\$400**

Advanced registration  
before **04. 07. 2025**

**Save  
\$200**

Early bird registration  
before **01. 08. 2025**

**Register online ►**

Phone

1300 829 338

Post

The Tax Institute  
Level 21, 60 Margaret Street  
Sydney NSW 2000

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 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

### 2 Full conference registration

	Member	New member*	Non-member
<b>Advanced registration</b> Received on or before 4 July 2025	<input type="checkbox"/> \$1,695	<input type="checkbox"/> 2,090	<input type="checkbox"/> \$1,995
<b>Early bird registration</b> Received on or before 1 August 2025	<input type="checkbox"/> \$1,895	<input type="checkbox"/> \$2,290	<input type="checkbox"/> \$2,195
<b>Standard registration</b> Received after 1 August 2025	<input type="checkbox"/> \$2,095	<input type="checkbox"/> \$2,490	<input type="checkbox"/> \$2,395

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

To book accommodation, please visit our dedicated website courtesy of our travel provider, ConferenceNational: [conferencenational.com.au/tts-2025](http://conferencenational.com.au/tts-2025)

#### \*Become a member and save!

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

- save over **\$230 off Affiliate membership** for the first 12 months
- access member-only prices to this and future events
- access all member-only technical resources.

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

### 3 Technical session selections

SME	Corporate	Tax Disputes	Indirect Tax	Next Generation	Ethics	Hot Topics
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#### Wednesday, 3 September 2025

12:00–1:00pm	<input type="checkbox"/> Session 4.1	<input type="checkbox"/> Session 4.4
2:00–3:00pm	<input type="checkbox"/> Session 5.1	<input type="checkbox"/> Session 5.2
3:30–4:30pm	<input type="checkbox"/> Session 6.1	<input type="checkbox"/> Session 6.2
4:30–5:30pm	<input type="checkbox"/> Session 7.1	<input type="checkbox"/> Session 7.4

#### Thursday, 4 September 2025

10:30–11:30am	<input type="checkbox"/> Session 10.1	<input type="checkbox"/> Session 10.2	<input type="checkbox"/> Session 10.3	<input type="checkbox"/> Session 10.4
11:30am–12:30pm	<input type="checkbox"/> Session 11.1	<input type="checkbox"/> Session 11.2	<input type="checkbox"/> Session 11.3	<input type="checkbox"/> Session 11.4
2:00–3:00pm	<input type="checkbox"/> Session 13.1	<input type="checkbox"/> Session 13.2	<input type="checkbox"/> Session 13.3	<input type="checkbox"/> Session 13.4
3:30–4:30pm	<input type="checkbox"/> Session 14.1	<input type="checkbox"/> Session 14.4		
4:30–5:30pm	<input type="checkbox"/> Session 15.1	<input type="checkbox"/> Session 15.4		

#### Friday, 5 September 2025

9:30–10:30am	<input type="checkbox"/> Session 17.1	<input type="checkbox"/> Session 17.2	<input type="checkbox"/> Session 17.3	<input type="checkbox"/> Session 17.4
11:00am–12:00pm	<input type="checkbox"/> Session 18.1	<input type="checkbox"/> Session 18.2	<input type="checkbox"/> Session 18.3	<input type="checkbox"/> Session 18.4
12:00–1:00pm	<input type="checkbox"/> Session 19.1	<input type="checkbox"/> Session 19.4		

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:

JOIN TODAY





## 4 Social function selections

### DAY ONE – WEDNESDAY 3 SEPTEMBER 2025

#### Welcome Reception

The Summit welcome reception on Wednesday 3 September 2025 is included in the full Summit registration fee.

- ☐ I confirm I WILL attend the Welcome Reception OR  
☐ I WILL NOT attend

Additional tickets to Welcome Reception	Cost	No.of tickets	Name/s and dietary requirements
<input type="checkbox"/> YES, I require additional tickets	\$80		

### DAY TWO – THURSDAY 4 SEPTEMBER 2025

#### Gala Dinner

The Tax Summit Gala Dinner on Thursday 4 September 2025 is included in the full Summit registration fee. For catering purposes, please indicate whether you will attend the dinner.

- ☐ I confirm I WILL attend the Gala Dinner OR  
☐ I WILL NOT attend

Additional tickets to Gala Dinner	Cost	No.of tickets	Name/s and dietary requirements
<input type="checkbox"/> YES, I require additional tickets	\$175		
<input type="checkbox"/> Table of 10: YES, I require additional tickets to complete my table of 10 Guest names must be advised in writing no later than Friday 29 August 2025	\$1,750		

## 4 Payment summary

Summit registration	\$	<input type="text"/>
Welcome Reception– additional guest tickets (\$80 each)	\$	<input type="text"/>
Gala Dinner – additional guest tickets (\$175 each)	\$	<input type="text"/>
<b>Total payable</b>	\$	<input type="text"/>

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

## 5 Payment method

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

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

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

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

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

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





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.

### Registration options

	Group booking	Classic	Plus	Premium	Tailored
<b>Best for</b>	Full Registrations	SME	Mid-Tier	Corporate	Large/National
<b>Early bird registration</b> Received on or before 1 August 2025	Purchase 4 x full registrations and receive the 5th full registration free*	\$3,700	\$4,950	\$7,700	For larger teams or complex needs, our Tailored option offers maximum flexibility across session access, team size, and networking.  Contact the <a href="#">BRM Team</a> to design a custom package that fits your organisation.
<b>Standard registration</b> Received after 1 August 2025	-	\$3,900	\$5,150	\$7,900	
<b>Flexibility*</b>	-	Your choice of 12 sessions	Your choice of 36 sessions	Your choice of 60 sessions	
<b>Team attendance</b>	5 attendees	Up to 6 attendees	Up to 18 attendees	Up to 30 attendees	
<b>Networking Welcome Reception tickets</b>	Included for all delegates	x2 free passes	x5 free passes	x10 free passes	
<b>To register</b>	Please contact <a href="#">BRM Team</a>	Complete the form overleaf	Complete the form overleaf	Complete the form overleaf	

\*5th registration must be of equal or lesser value to the other registrations. No other discounts can be applied.

### All Employer Ticket attendees receive:

- Access to Plenary sessions 1, 2, 3, 8, 9, 12 and 16 **plus individual session selections**.
- 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)

Please note all sessions are face-to-face only.

### 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.
- Once each individual's session selections are registered, they will receive a confirmation email.

### Once you have registered

You will receive a tax invoice and registration confirmation email.

For event enquiries, please contact us at [BRMTeam@taxinstitute.com.au](mailto:BRMTeam@taxinstitute.com.au) or call direct on +61 8 6165 6606.

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### 1 Employer Ticket types

Ticket type	Early bird*	Standard	No. of tickets	Sub-total
Classic	<input type="checkbox"/> \$3,700	<input type="checkbox"/> \$3,900		
Plus	<input type="checkbox"/> \$4,950	<input type="checkbox"/> \$5,150		
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<input type="checkbox"/> Welcome Reception – Additional Ticket		\$80		
<input type="checkbox"/> Gala Dinner Ticket		\$175		
Total payable \$				

\*Received on or before 11 August 2023

### 2 Co-ordinator contact details

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms

First name:

Last name:

Position:

### 2 Co-ordinator contact details (cont)

Company:

Address:

Suburb:  State:  Postcode:

Telephone:  Mobile:

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### 3 Payment method

Please note: all registration payments must be made prior to the event

Credit card: ☐ AMEX ☐ Visa ☐ MasterCard

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The Tax Institute gratefully acknowledges the generous assistance of members of The Tax Summit Organising Committee and The Tax Summit Program Committee.

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