

Private Business Tax Retreat

TTI The Tax
Institute



 26-27 Feb 2026

 CPD 12

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

Jacqui Burnham, CTA, KPMG, Chair, Private Business Tax Retreat Organising Committee

Neil Brydges, CTA, Sladen Legal

Bruce Collins, CTA, Tax Controversy Partners

Billy-Jo Famlonga, FTI, Famlonga Business Services

Jane Harris, CTA, Brown Wright Stein Lawyers

Dominic Moon, ATI, Macpherson Kelley

Melinda Peters, CTA, McCullough Robertson

Jodie Robinson, CTA, McCullough Robertson

Stacey Smith, CTA, Grant Thornton



Welcome

The premier summer retreat for SME tax professionals

The Private Business Tax Retreat returns to the stunning Gold Coast in February, and I'm thrilled to chair this standout event once again. I'd like to thank my fellow organising committee members for shaping a dynamic program that addresses the topics impacting advisers and their SME clients in 2026 and beyond.

Two days of insight, strategy, and connection

Crafted by leading legal and accounting professionals from across Australia, our 2026 program promises to deliver the perfect blend of technical depth and practical know-how that the Private Business Tax Retreat is known for. Whether you advise family businesses or fast-growing SMEs, you'll gain the expert insights needed to elevate your practice and stay ahead in a rapidly evolving landscape.

Expect the unexpected – Private business with a twist

Engage with top tax specialists as they take on the weird, wonderful, and wildly relevant with topics covered in a way that you haven't seen before. With sessions on small business concessions, estates and navigating the ATO, trust deeds, payroll tax and of course the Hot Topics Round Up where you can hear from experts on the latest breaking tax news as it happens.

Learn, network, and recharge on the Gold Coast

The Private Business Tax Retreat is your chance to step away from the office and reconnect professionally and personally. With 12 CPD hours on offer and set to the backdrop of sun, surf and sand, you can extend your summer vacation and start off your year building meaningful connections and learning from some of the best minds in tax.

Join us in person or online – wherever you are, this is your opportunity to start the year inspired, informed, and ready for what's next.

We can't wait to welcome you in February!



Jacquii Burnham, CTA
Chair, Retreat Organising Committee

Early bird pricing offer
Register on or before Friday, 30 January 2026 to save!

Technical program

Day 1 Thursday, 26 February 2026

Time *AEST	Session
8.00 – 8:45am	Registration
8:45 – 9:00am	Welcome and President’s address Speakers: Jacqui Burnham, CTA, KPMG, Tim Sandow, CTA, President, The Tax Institute
9:00 – 10:00am	Session 1: Keynote address Speaker: The Hon. Bruce Billson, Australian Small Business and Family Enterprise Ombudsman Facilitator: Julie Abdalla, FTI, The Tax Institute Hear first-hand from a key and influential decision maker in one of his final addresses as Ombudsman. A session not to be missed!
10:00 – 10:30am	Morning tea
10:30 – 11:30am	Session 2: Keeping up with the latest changes in Superannuation Speaker: Alexandra Plumb, Vincents This session will cover an update on the latest legislative changes (and proposed changes) in the world of superannuation and SMSFs, as well as a refresher on the some of the important topics that members should be consider when advising their clients. Topics include the proposed Division 296 legislation, Payday Super and NALE/NALI changes.
11:30am – 12:30pm	Session 3: Corporate tax for SMEs – Not just the preserve of the big end Speaker: Neil Brydges, CTA, Sladen Legal “That’s just for the big end of town” can be a popular cry. However, “big end” rules are increasingly impacting SME and private wealth clients. Missing when those rules apply can be costly for clients – and advisers. This session aims to arm SME and private wealth advisers with the tools to spot when “big end” rules might apply and whether further research, or engaging a specialist, is needed. The session will include discussion on the following “big end” rules: <ul style="list-style-type: none">• Thin capitalisation;• Debt Deduction Creation (DDCR);• Transfer Pricing; and• Hybrid mismatch.
12:30 – 1:30pm	Lunch

Technical program

Day 1 Thursday, 26 February 2026 *continued*

Time *AEST	Session
1:30 – 2:30pm	<p>Session 4: Division 7A in practice – Managing income streaming, concessions and compliance risks Speaker: Amanda Guruge, CTA, Tax Controversy Partners</p> <p>Division 7A continues to present practical and interpretive challenges for practitioners and their clients. This session examines key problem areas and recent ATO approaches, with a focus on income streaming arrangements, the application of sections 109RB, 109T and 109R, and the treatment of “sleeper” provisions. The session will also discuss:</p> <ul style="list-style-type: none">• Income streaming and how it works with Div 7A including the inadvertent risks;• Common mistakes and options for resolving issues;• 109T & 109R – The “sleeper” provisions; and• Approaches from the ATO on 109T.
2:30 – 3:00pm	Afternoon tea
3:00 – 4:00pm	<p>Session 5: Defence against the dark arts – Mastering the Small Business CGT concessions Speaker: John Ioannou, CTA, Macpherson Kelley</p> <p>The small business CGT concessions remain an important component of effective tax planning, but determining eligibility continues to be an area of complexity and ATO scrutiny. This session provides a detailed examination of the key tests and practical issues that arise when applying the concessions, including:</p> <ul style="list-style-type: none">• What’s in and what’s out;• Liabilities;• Issues arising from cases;• What is best practice;• How to brief a valuer; and• Should you get more than one valuation.



Technical program

Day 1 Thursday, 26 February 2026 *continued*

Time *AEST	Session
4:00 – 5:00pm	<p>Session 6: The final return – Death, estates and navigating the ATO Speaker: Sally Preston, CTA, Smart Solutions Tax & Business Advisory</p> <p>When it comes to private groups, death doesn't just end a life – it triggers a complex chain of tax and administrative consequences. This session explores what happens when key individuals pass away, from the death of a shareholder, beneficiary, or director, to the administration of estates and dealings with the ATO. We'll unpack technical issues such as the treatment of Division 7A loans, the timing and implications of CGT events (including the so-called "double death" problem), and the uncertainties that arise when estates remain unsettled. You'll gain practical insights into managing the tax, compliance, and administrative challenges that follow the inevitable – ensuring that when death and taxes collide, you and your clients are ready.</p> <ul style="list-style-type: none">• Death & taxes for private groups;• Technical issues that arise;• Uncertainties and what happens;• Div 7A issues;• Death of a beneficiary before the estate has been settled – trigger of a CGT event? – TD and submissions on double-death.• Administering an estate; and• Death of a director of a company with no will.
5:00 – 5:30pm	Delegate free time
5:30 – 7:30pm	Networking reception



Networking reception

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

The networking reception will be held at The Green, QT Gold Coast on Thursday evening directly following the last session of the day. Celebrate the start of the retreat with a sparkling evening under the stars, surrounded by good company, fresh sea breezes, and the relaxed Gold Coast vibe.

Date: Thursday, 26 February 2026

Time: 5:30–7:30pm

Venue: The Green, QT Gold Coast

Price: Inclusive for all full registration delegates
Additional tickets are \$80 per person, see registration form for details

Dress: Business casual

Technical program

Day 2 Friday, 27 February 2026

Time	Session
8:30–9:30am	<p>Session 7: Trust deeds under the microscope – Income, variations and hidden traps Speaker: Melinda Peters, CTA, McCullough Robertson</p> <p>Trusts generally have a limited lifespan, but much can happen throughout that life, meaning that changes to the terms of the trust are often required. However, such changes may give rise to hidden tax costs if not properly considered. This session will investigate a number of common legal issues and their practical implications in the context of amending the terms of a trust during the course of its life, including:</p> <ul style="list-style-type: none">• Amending a trust deed for changing circumstances – What is and is not permissible?• Hidden tax and duty costs when varying a trust deed; and• The trust deed is missing – Now what?
9:30–10:30am	<p>Session 8: To extend or not to extend Speakers: Dung Lam, CTA, West Garbutt, Hugo Southcott, West Garbutt</p> <p>Do you have any trust deeds with only a short period of time until they are due to vest? Were the trusts established in a state other than Queensland or South Australia? Wondering what the new 125-year perpetuity period in Queensland means for your clients? This session breaks down the key issues you need to know, including:</p> <ul style="list-style-type: none">• Queensland's updated perpetuity rules including the August 2025 changes to the Property Law Act (Qld);• When your trusts will have a sufficient connection to South Australia or Queensland; and• Key risks where other states are involved. <p>This session will help you navigate the shifting landscape with confidence. Join us to stay ahead of the curve and avoid costly missteps.</p>
10:30–11:00am	Morning tea



Technical program

Day 2 Friday, 27 February 2026 continued

Time	Session
11:00am–12:30pm	<p>Session 9: Hot topics round up</p> <p>Part 1: Latest developments in ATO debt strategies (and what it means for practitioners) Speaker: Bruce Collins, CTA, Tax Controversy Partners</p> <p>This session will discuss:</p> <ul style="list-style-type: none">• ATO Vulnerability Framework final issued;• ATO debt ‘concession’ principles consultation;• ATO GIC and FTL penalty remission process released;• ATO GIC and FTL penalty remission examples (pro and con) released;• Tax Ombudsman review of ATO GIC underway; and• Treasury consultation on law changes for ‘coerced directorships’ underway (relevant for DPNs). <p>Part 2: Payday Super: What You Didn’t Know – Preparing Clients for 1 July 2026 Speaker: Billy Jo Famlonga, FTI, Famlonga Business Services</p> <p>This session will deliver a comprehensive overview of the Payday Super reforms, unpacking critical legislative changes, the shift to qualifying earnings calculations, the revamped Superannuation Guarantee Charge (SGC) mechanics—including notional earnings, administrative uplift, and deductible status—plus the ATO’s transitional, risk-based compliance approach under finalised PCG 2026/1 (low/medium/high-risk categorisation for 1 July 2026–30 June 2027).</p> <p>Attendees will gain practical insights into enforcement priorities, transitional relief expectations, and preparation strategies such as client readiness assessments, payroll system reviews, cash flow/tax planning adjustments, risk mitigation, and voluntary disclosure protocols.</p> <p>Part 3: From one generation to the next -The tax side of succession Speaker: Jenny Lin, Australian Taxation Office</p> <p>As Australia’s privately owned and wealthy groups prepare for an unprecedented transfer of wealth, succession planning has never been more critical.</p> <p>This session will:</p> <ul style="list-style-type: none">• Explore the tax implications of passing businesses and assets to the next generation; and• Highlight key risks and governance considerations, and how advisers can guide their clients through this transition.

Technical program

Day 2 Friday, 27 February 2026 continued

Time	Session
12:30 – 1:30pm	Lunch
1:30 – 2:30pm	<p>Session 10: Payroll tax risk areas – Industry hotspots and practical solutions Speakers: Fletch Heinemann, CTA, HLS Tax Law, Sarah Lancaster, HLS Tax Law</p> <p>Payroll tax audits have increased, with risks in several areas and industries – determining exactly what amounts are taxable wages can be difficult. Businesses operating in industries providing security services, or cleaning services and modelling agencies are grappling with the application of the employment agent provisions and the elusive ‘in and for’ test. Meanwhile, businesses structures that include service entities or other tripartite arrangements are coming under scrutiny with the relevant contract provisions. And all this before the grouping provisions!</p> <p>This session will provide:</p> <ul style="list-style-type: none">• An update on the current interpretation and application of the employment agency provisions, through the lens of the security services industry.• Insights on when payments under relevant contracts are taxable wages, through the lens of businesses using service entities (like medical practices) and other tripartite arrangements (like the case in Uber).• The State revenue’s current approach to relevant contracts and employment agency contracts; and• Practical strategies for agreements and audits.
2:30 – 3:00pm	Afternoon tea
3:00 – 4:00pm	<p>Session 11: Emerging issues in the private space Panellists: Billy-Jo Famlonga, FTI, Famlonga Business Services, Jane Harris, CTA, Brown Wright Stein, Mark West, CTA, West Garbutt Facilitator: Jacquii Burnham, CTA, KPMG</p> <p>Join an interactive panel with experienced practitioners as we explore current developments and practical insights in the private space. The session will focus on key compliance risks, common pitfalls, and the ATO’s approach to these complex areas.</p>
4:00pm	Retreat close

Presenters

Julie Abdalla, FTI, is the Head of Tax & Legal at The Tax Institute. Julie has practiced in the tax teams of Big 4 and top tier law firms in Sydney and Melbourne, and at an international law firm in London. She has expertise in law and policy across a broad range of taxes and industry sectors. Julie is driven to achieve holistic tax reform, and has the depth of knowledge to advocate for members and the betterment of the tax system. Julie leads the Tax Policy & Advocacy team and has oversight of The Tax Institute's National Technical and State Taxes Committees comprised of over 150 volunteers. She represents The Tax Institutes in several external forums including the ATO's National Tax Liaison Group and the Australian Treasury's Tax Treaty Advisory Panel. Julie provides strategic and technical advice to Government and other stakeholders, and has appeared as an expert witness in several Senate Committee inquiries.

The Hon. Bruce Billson is the Australian Small Business and Family Enterprise Ombudsman (ASBFEO) an independent advocate for small business owners. His office has the legislative powers needed to effectively influence our nation's lawmakers to remove unnecessary obstacles and reduce headwinds so small and family business owners can do what they do best – run their

business. The ASBFEO office also provides small businesses and family enterprises with assistance should they find themselves involved in a dispute. The ASBFEO acknowledge owning and operating a small or family business is a big responsibility and a deep personal commitment and thank small and family business owners for their dedication and significant contribution to the economy and our future prosperity. Their mission is to help make Australia the best place to start, grow and transform a business.

Neil Brydges, CTA, is a Principal in Sladen Legal's tax group. Neil primarily practises in direct taxes and GST, with a focus on the taxation of trusts, deceased estates, property, corporate tax, M&A and Division 7A. Neil has also advised extensively on cross-border taxation issues. Neil is an Accredited Specialist in Taxation Law and a member of the Tax & Revenue Law Committee with the Law Institute of Victoria, Chair of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser with The Tax Institute.

Bruce Collins, CTA, worked for over 35 years in the Tax Office, a third of this time as a Senior Executive in what is now Client Engagement Group. While with the ATO, Bruce worked as a technical and strategic leader covering its legislative,

interpretative, private advice, public advice, compliance, audit, investigative, prosecution, objection, dispute resolution and litigation functions. After he left the ATO in 2017, in addition to running a small business advisory firm, Bruce worked in private practice for a couple of years as a legal contractor and an employee solicitor before deciding to start his own firm. In May 2021, Bruce set up the boutique tax law firm Tax Controversy Partners Pty Limited, specialising in assisting individuals, small businesses and private groups. Bruce helps clients to navigate the many uncertainties in the tax and super system, drawing upon his previous experience with the ATO on the other side of the fence.

Billy-Jo Famlonga, FTI, is the founder and principal of Famlonga Business Services. With over 15 years' industry experience her practice focuses on taxation compliance, business structuring, succession planning, not-for-profits and providing a comprehensive suite of additional services to the SME market including specialising in business technology and process automation. Billy advises clients across a diverse range of industries, including primary production, freight and logistics, digital assets, retail and the NDIS sector. Billy holds a Graduate Diploma of Applied Tax Law and is a Fellow Member

of The Tax Institute and the Institute of Public Accountants. Billy serves as the current Vice Chair of The Tax Institutes WA State Council and is actively involved in many of WA's local working groups, including Women in Tax, Emerging Leaders and Local Engagement.

Jane Harris, CTA, is a Senior Associate at Brown Wright Stein Lawyers with over 15 years of experience assisting high net wealth and SME clients with taxation matters. With a background in accounting and business services, Jane provides tax and commercial advice to accountants, small to medium enterprises and private clients. Jane is an admitted Solicitor of the Supreme Court of NSW and holds Bachelor of Commerce, Bachelor of Arts, Juris Doctor and Master of Law degrees from the University of Sydney.

Fletch Heinemann, CTA, is a principal at HLS Tax Law who specialises in helping clients and their advisers with tax and customs issues. Fletch has a particular interest in helping clients navigate ATO reviews and audits. Fletch and his team help clients with advice, private rulings, objections and litigation. Fletch has also presented sessions at The Tax Institute's Queensland seminars and national conferences and has published papers on topical tax and customs issues.

Presenters

John Ioannou, CTA, was admitted as a Solicitor in 2002, is a Principal Lawyer at Macpherson Kelley and leads the national tax practice. He has experience in the areas of tax structuring, tax disputes and commercial transactions. John has a Bachelor of Arts, Bachelor of Laws and a Masters of Law. John is currently serving as the QLD representative on the Tax Institute's National Council.

Dung Lam, CTA, is a Principal at West Garbutt and is based in Sydney. Dung has more than two decades of experience in advising on a wide variety of taxes including income tax, capital gains tax, GST and state taxes such as duty, payroll tax and land tax. Dung also has extensive experience advising on taxation trusts, superannuation issues in the self-managed superannuation funds arena and tax issues related to estate planning. Dung is a Chartered Tax Adviser, full member of the Society of Trusts and Estate Practitioners, an accredited Specialist in Business and Personal Tax with the NSW Law Society, a member of the Business Law Section Taxation Committee of the Law Council of Australia and a member of the NSW Law Society Liaison Committee with the Revenue NSW. Dung advises a broad range of clients ranging from corporates,

small to medium enterprises, high net worth individuals, professional firms, accountants, financial planners and their clients.

Sarah Lancaster is a principal at HLS Tax Law. She advises and represents taxpayers in a wide range of tax disputes, including those involving the ATO and State Revenue authorities. Her technical expertise covers various areas such as income tax, international tax, GST, payroll tax, stamp duty, and customs duty.

Jenny Lin is an Assistant Commissioner leading the ATO's Private Wealth Risk & Strategy area, focusing on identifying and addressing tax risks to improve the tax performance of Australia's privately owned and wealthy groups. She also leads Private Wealth's Adviser Strategy and Data & Analytics programs. Jenny began her career in GST policy and law design at Treasury before joining the ATO in 2012, and has held roles across Superannuation & Employer Obligations, Tax Counsel Network and Service Delivery within the ATO.

Melinda Peters, CTA, is a specialist tax and duty lawyer, practising in all areas of direct and indirect tax – with a particular focus on the transaction taxes,

structuring and funds management. A partner in McCullough Robertson's highly regarded taxation team and a chartered tax adviser, Melinda prides herself on achieving commercial outcomes and providing practical advice to clients. In her role, Melinda acts for a range of clients, from individuals to start ups, to large corporate clients and managed funds. She advises extensively on cross-border taxation issues and inbound and outbound investment structures, mergers and acquisitions, trusts and is experienced in advising and implementing a range of employee incentive and remuneration arrangements. She also assists clients with taxation and duty disputes and has experience in such matters before the Federal Court, AAT and Queensland Supreme Court. Melinda holds a Juris Doctor from the University of Queensland and a Masters of Taxation from the University of Sydney.

Alexandra Plumb is an SMSF specialist with expertise in taxation, retirement planning, contribution strategies, and superannuation compliance. She has over 15 years' experience working in taxation and superannuation for a number of accounting and advisory firms in regional and metropolitan Queensland.

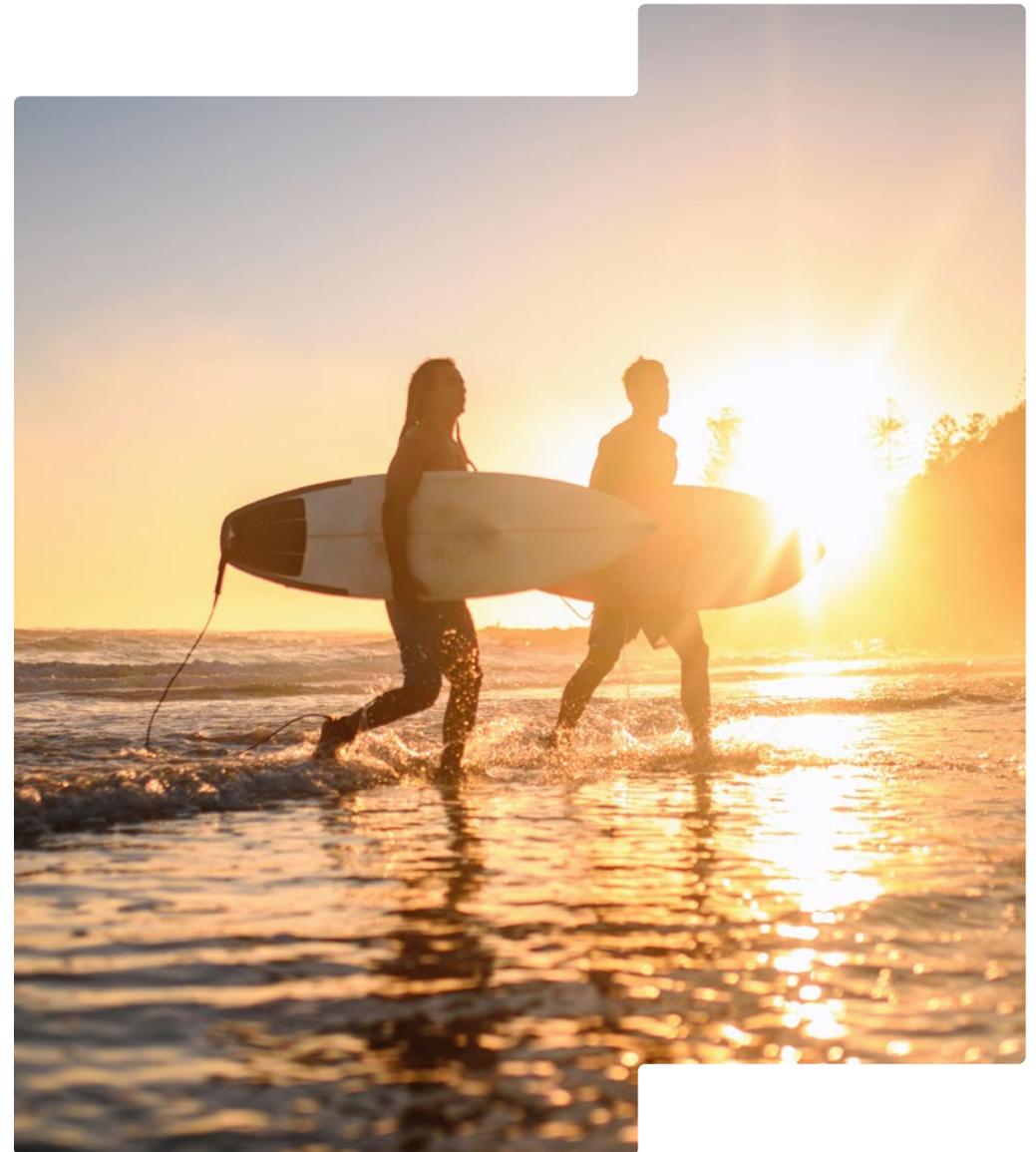
Alexandra is also a former financial adviser, with specialist experience in personal injury and aged care advice, adding further depth to her client-focused approach.

Hugo Southcott is a qualified lawyer who advises on a broad spectrum of taxation matters, including Queensland and NSW duty and land tax, income tax, capital gains tax, business structuring and restructuring, tax-effective business succession and corporate taxes. Hugo is also experienced in advising on trust law matters, superannuation guarantee issues for employers, the self-managed superannuation fund administration rules and the establishment of charities and foundations. Hugo assists high net wealth individuals and private groups, small to medium sized businesses, not-for-profit organisations and their advisers. He regularly advises on the capital gains tax and duty consequences of business sales, restructures and intergenerational transfers, including the availability of small business concessions, rollovers and duty exemptions. Hugo also assists clients by drafting trust variations, applying for private rulings, ex gratia relief and land tax exemptions, and by drafting transaction documents.

Presenters

Sally Preston, CTA, is a partner of Smart Solutions Tax and Business Advisory. Sally has an extensive compliance and advisory background, specialising in tax consulting and transaction advisory. With a diverse career background, Sally has worked across various industries and offers a wide range of services to both small and large organisations. These services have included tax advisory, compliance, complex group structures including structuring for listed inbound and privately owned businesses, and assistance with ATO and Revenue office audits.

Mark West, CTA, is a qualified as a lawyer, chartered accountant and chartered tax adviser, Mark provides advice across the spectrum of taxes. Mark assists with all legal matters involving taxation law. He advises on appropriate business or investment structures/restructures and on making applications for rulings from the ATO. He assists with tax audits and with related settlement negotiations with the ATO and State revenue authorities. He has acted for clients in tax cases before the Administrative Appeals Tribunal and the Full Federal Court. Mark been listed as a leading tax lawyer in Queensland by DoYLES Guide and The Best Lawyers™ in Australia.



Venue and accommodation



QT Gold Coast

7 Staghorn Ave, Surfers Paradise QLD 4217

The sun is up on QT Gold Coast. Is this the chicest place you'll ever walk sand through? Unlace yourself to barefoot indulgence and oceanfront deco, dripping with the promise of a never-ending summer. Stay afloat between surf and sky, head poolside and swim laps in luxury. Dive, recline, spa, drink, dine, dance and never stop, this is your designer playground to explore. Follow the neons to Yamagen Japanese, wander the Bazaar Marketplace, and kick back in rooms where golden hues meet sun-kissed serenity. The rest, is relaxation.

Getting there

The QT Gold Coast is located approximately 30 minutes from the Gold Coast Airport by car. Alternatively, public transport is available with the closest tram station, Cypress Avenue, a 3 minute walk from the venue.

Parking

Car parking is available for guests upon request, fees do apply and are subject to change.

Accommodation

Favourable room rates have been negotiated and secured at the QT Gold Coast. Accommodation bookings can be made directly through the hotel via this link – [Private Business Tax Retreat | QT Gold Coast](#).

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 (CPD)

Attendance at the conference counts for 12 hours of CPD with The Tax Institute.

The Tax Institute's attendee hub

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

Delegate list

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

Dress code

Business or business casual attire is suitable for the duration of the retreat, including the Networking reception on Thursday evening.

Networking reception

Networking reception – Thursday, 26 February 2026

The Networking reception will be held onsite at The Green, QT Gold Coast.

The Networking reception is included in the event registration fee for delegates, and additional tickets can be purchased for accompanying persons and guests at a cost of \$80.

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/ lunches	Attendance at the Welcome reception*
Full registration This registration option entitles one delegate to attend the entire event.	✓✓✓	✓✓✓	✓✓✓
Online full registration This registration option entitles one delegate to attend the entire event.	✓✓✓		

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

Discounts

Early bird registration

All registrations received and paid on or before Friday, 30 January 2026 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.

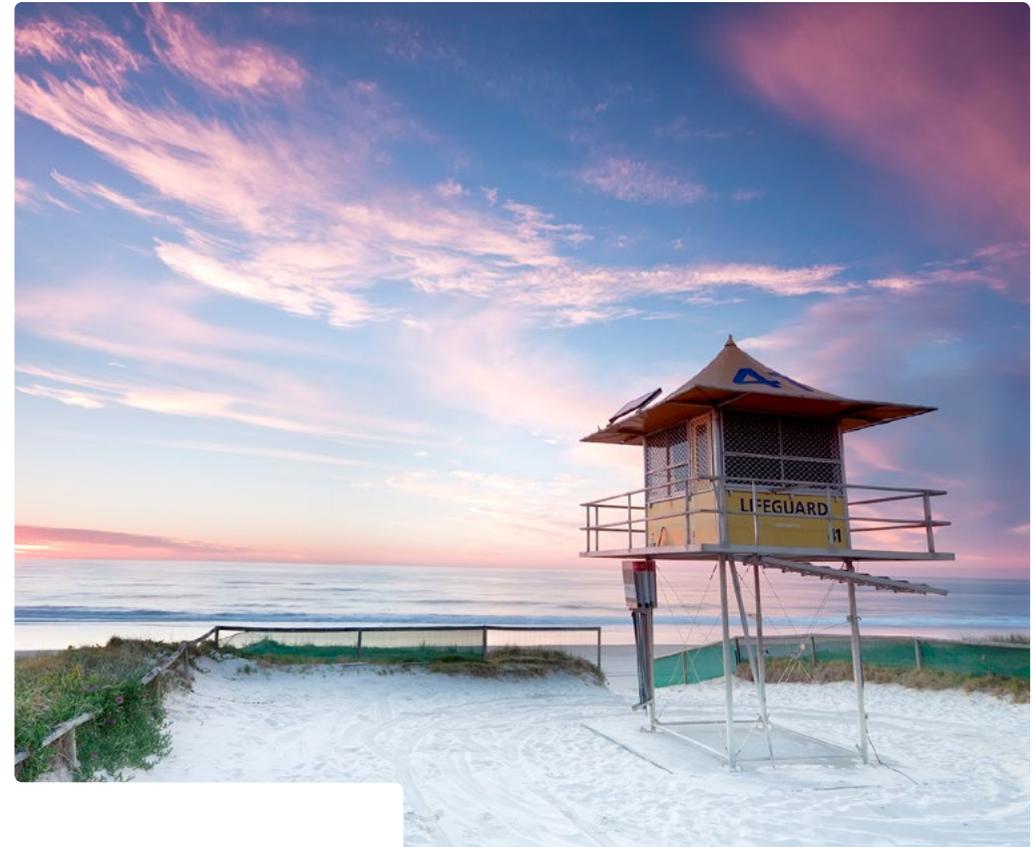
This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

Register now!

Register online
▶

Register via form
▶

included in this brochure



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 – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 30 January 2026	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$2,090	<input type="checkbox"/> \$1,995
Standard registration Register after Friday 30 January 2026	<input type="checkbox"/> \$1,895	<input type="checkbox"/> \$2,290	<input type="checkbox"/> \$2,195

Online registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 30 January 2026	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$2,090	<input type="checkbox"/> \$1,995
Standard registration Register after Friday 30 January 2026	<input type="checkbox"/> \$1,895	<input type="checkbox"/> \$2,290	<input type="checkbox"/> \$2,195

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

Networking reception

The Networking reception is INCLUDED in the registration fee for delegates attending the full retreat

Thursday, 26 February 2026 at the QT Gold Coast

- Yes, I WILL be attending the Networking reception OR
 No, I WILL NOT be attending the Networking reception
 Yes, I require additional tickets for the Networking reception at \$80 per person

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

Dietary requirements:

2 Delegate contact details

Member no.:

If your member details are up-to-date, you can skip this section.

Title: Mr Mrs Miss Ms Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking

*Become a member and save!

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

- save over \$230 on Affiliate membership on 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

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 the conversation

-  [linkedin.com/school/the-tax-institute](https://www.linkedin.com/school/the-tax-institute)
-  [facebook.com/thetaxinstitute](https://www.facebook.com/thetaxinstitute)
-  twitter.com/taxinstituteoz
-  [instagram.com/thetaxinstitute_](https://www.instagram.com/thetaxinstitute_)

