

A better future together: update

March 2026

In December 2025, we announced the The Tax Institute's Board had signed a Heads of Agreement with the Institute of Public Accountants (IPA) to explore the opportunity to become part of the IPA Group.

This is an opportunity to:

1
Create step change in key investment areas such as technology and service delivery

2
Protect what the Institute is today and what our members are proud of



We are currently undergoing due diligence, exploring whether the proposal is the right way forward for our future.



Why are we exploring this proposal?

A strategic reset in 2023 to address declining financial performance coming out of the COVID-19 pandemic meant we were able to stabilise our cashflow, grow capital and invest in key areas for maximum impact. However, while sustainable in the short-term, our cash reserves have not replenished to the level we can support further immediately necessary investments, including:



A significantly updated tech stack

Our current technology results in poor member experience, restricts the ability to attract new members and creates constraints on internal productivity.



Improved service delivery

Member feedback shows a desire for more varied and tailored delivery of benefits and services, such as support for tax technical queries and print delivery of resources.

We want to explore our future opportunities to invest and grow now, from a place of stability. With membership in gradual decline across the sector, acting early is essential to ensure there continues to be a strong and relevant Institute into the future. The longer we delay, the further we fall behind and the more limited our options for building a modern Institute become.

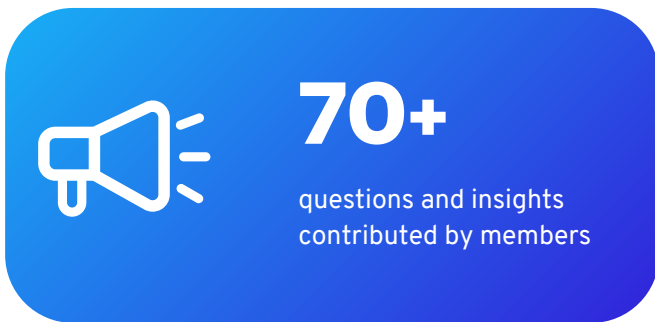
TTI Member Consultation insights

In February 2026, we held 10 Member Consultation sessions in capital cities around Australia and online.

The aim of these sessions was to:

- 1 Provide members with the background information you need to understand why and how we arrived at the current proposal
- 2 Explain more about what the proposed opportunity would mean for members and the future of The Tax Institute
- 3 Give members the opportunity to raise questions, concerns, feedback or potential impacts. Member views will help inform due diligence and decision-making as we move forward

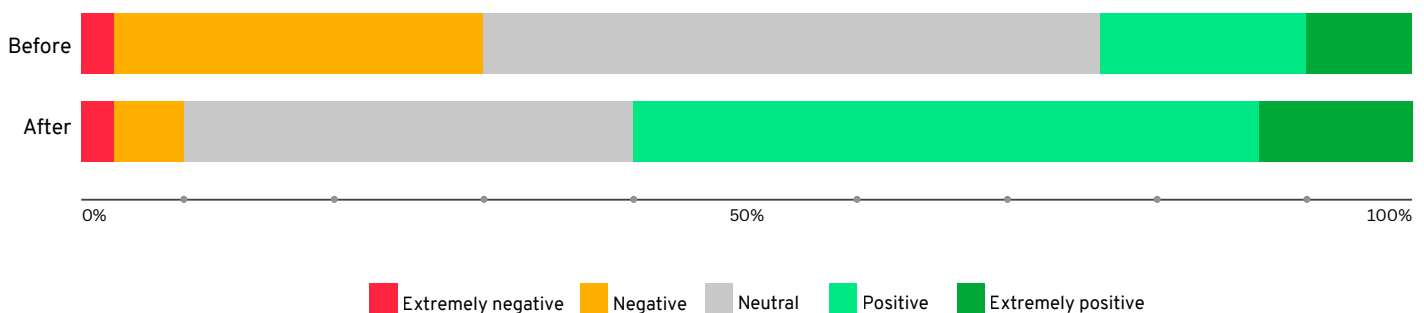
All members were invited to come along to a Consultation session to engage in the future of their Institute.



Overall member sentiment

We asked members how they felt about the proposed amalgamation both before and after the Consultation sessions.

When members are fully informed about the opportunity being explored, the answer is clear: the majority recognise it as a positive move for our future.





Member questions & insights

Members contributed many comments, ideas and questions to the discussion. Here are three of the key themes that emerged in members questions.

How would the arrangement be structured legally?

Under the currently proposed plan, TTI would become a member of the IPA Group. TTI and IPA would remain separate legal entities, limited by Guarantee. IPA would be the sole member of the legal entity.

In effect, our memberships would remain distinct. Through the retention of our By-Laws, Committees and Councils, TTI members retain control over TTI's direction, advocacy and output.

Legally, our members hold a voting interest in the IPA group but have a TTI designated membership, preserving and protecting the identity and sense of belonging within our tax community.

What would TTI membership look like post-amalgamation?

Largely, membership remains the same. You will still be a member of The Tax Institute and this amalgamation would not change the fee you pay, your designation, the member benefits you receive or the education, events and CPD you take part in.

What changes is that thanks to savings in our back-office costs, our technology will improve and we will be able to explore new ways to better deliver our services to you. You will be part of a larger overall community, which will be reflected in continued strong advocacy, evolving benefits and broader professional opportunities.

Why is IPA the preferred partner to explore this with?

With such a diverse membership, incorporating CAs, CPAs, IPAs, lawyers and other practitioners, one of our main priorities was protecting what the Institute is today and what our members are proud of.

In this regard it was crucial to align with an association which would ensure our members still had a voice - not one which could result in the significant dilution of our members voice such that their needs and sense of community risked being overlooked.

IPA have a proven track record with amalgamation that allows each organisation to retain its brand and identity.

We are adamant that the Institute should remain driven by its members, for its members and feel that a partnership with IPA represents the best opportunity to move forward while continuing to be The Tax Institute you know and the home of tax in Australia.

 Want to contribute further feedback or questions?

Email us at feedback@taxinstitute.com.au to connect directly with the leadership team.