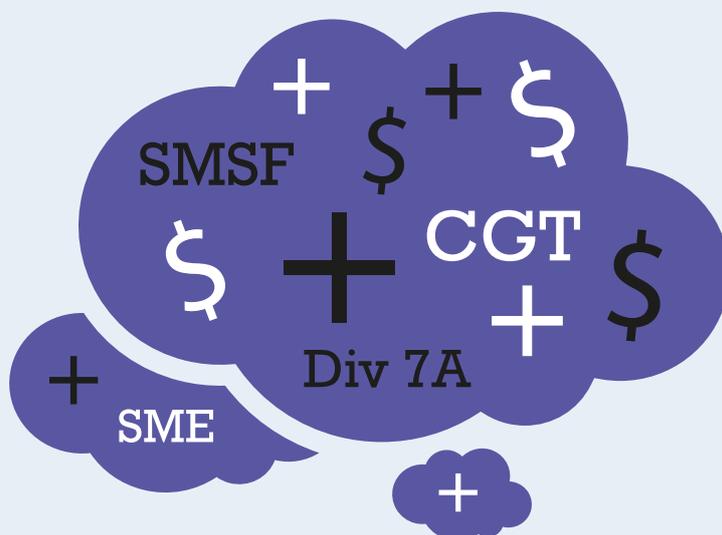




THE TAX INSTITUTE



2017 SME SYMPOSIUM

9 November 2017
Primus Hotel Sydney

Welcome

SME *Symposium*

The tax professional of the future undoubtedly looks different. In addition to being a subject matter expert, the successful tax practitioner will be someone who can navigate the ever-changing technology landscape to benefit their clients and practice.

SME Symposium will address the key issues as they specifically relate to operating the tax practice of the future.

Not forgetting about the needs of today, SME Symposium will deliver strong tax technical content. We have included facilitated case studies to really enhance the learning experience. Everything you need for these case studies will be presented on the day, so no pre-reading is required!

Registrations are now open! We look forward to seeing you there.

Mariana Von Lucken, CTA, Tax Partner with HLB Mann Judd

Chair, Conference Organising Committee

Thank you

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

Adrian Bailey, *Cleary Hoare*

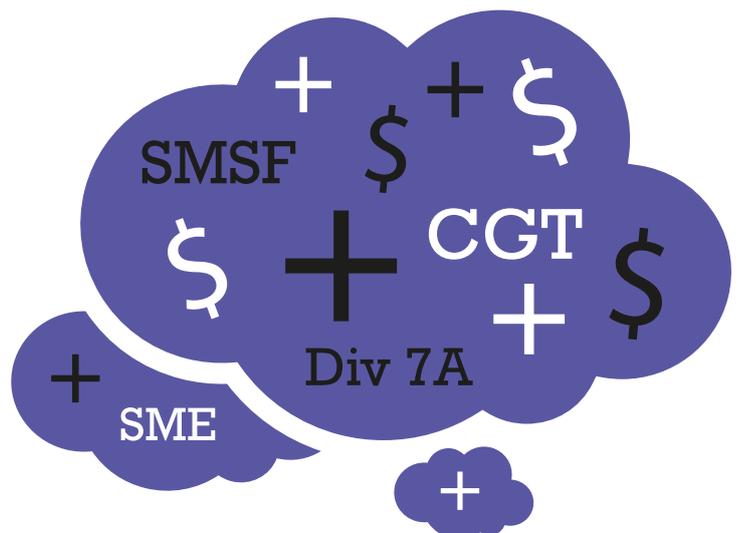
Nidal Danoun, CTA, *Prosperity Financial Services Pty Ltd*

Scott McGill, CTA, *Pitcher Partners*

Darren Shone, CTA, *PKF*

Simon Thorp, *KPMG*

Todd Want, CTA, *William Buck*



Technical Program

Event summary

Thursday 9 November 2017

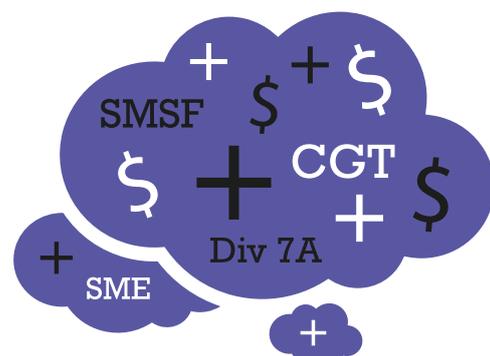
Time	Session	Presenter
8.15am– 8.45am	Registration	
8.45am	Welcome	
9.00am–10.00am	<p>Session 1: Rethinking the role of a tax professional – is a new model needed?</p> <p>The tax profession is coming under unprecedented pressure, including:</p> <ul style="list-style-type: none"> ▪ The changing role of the tax expert ▪ New business models, including the rise of the peer to peer economy ▪ Emerging technologies ▪ The ATO's attitudes and drive towards compliance simplification <p>This session will consider the impact of change, how to seize the opportunities it brings and what will become critical to embrace as a future practitioner.</p>	<p>Steve Healy, CTA (Life), Grant Thornton</p>
10.00am–11.00am	<p>Session 2: Navigating the digital landscape. A plan for today's tax professional.</p> <p>For deeply technical professionals, technology may feel like a foreign or even irrelevant topic, others will simply be overwhelmed by the sheer volume of possibilities and choices.</p> <p>In this session we will provide a simple framework that you might use in order to navigate the digital world in the context of your evolving tax practice and the business problems you are looking to solve.</p> <p>Examples of specific solutions and required capabilities will be provided to bring this framework to life and will touch technologies needed to operate your evolving practice through to technologies to grow your market or client base.</p>	<p>Michael Cox, PwC</p>
11.00am–11.15am	Morning Tea	
11.15am–12.15pm	<p>Session 3: Evolution or Revolution?</p> <p>An opportunity to engage with our speakers, and ask the burning questions during this panel session.</p> <p>Hear from a practitioner who has reinvented his business and join the conversation with our panel. They will answer questions such as:</p> <ul style="list-style-type: none"> ▪ How to create the tax business of the future? ▪ What effect will the future have on changing the client and people experience? ▪ What does embracing change and making a difference look like? 	<p>Steve Healy, CTA (Life), Grant Thornton</p> <p>Michael Cox PwC</p> <p>Chris Bray Bray Chan Chartered Accountants</p>
12.15pm–1.00pm	Lunch	

Technical Program

Event summary

Thursday 9 November 2017 (cont)

Time	Session	Presenter
1.00pm–2.00pm	Session 4: Evolving structures of SMEs – more than meets the eye Whilst the use of Trusts remains a favourable vehicle of choice for SME's, recent legislative changes present new opportunities for SME structures. This session will review the following structuring considerations when looking at today's SME's: <ul style="list-style-type: none">▪ Small Business Entities and their advantages▪ What are the options when your client needs to change their structure?▪ Small Business Rollover▪ Small Business Concessions▪ Division 615 Rollover▪ Other available CGT rollovers Various taxation implications when considering a structure.	Dominic Moon, CTA, McCullough Robertson
2.00pm–3.00pm	Session 5: Facilitated case study discussion	Dominic Moon, CTA, McCullough Robertson
3.00pm–3.15pm	Afternoon Tea	
3.15pm–4.15pm	Session 6: Division 7A/flow through trust/UPE Division 7A continues to cause problems for both those familiar with its bite and for those coming anew to the issues it can cause. The lecture part of this session will cover how to diagnose and deal with Division 7A issues, both the common and the uncommon, and will also look to the anticipated changes to Division 7A to apply from 1 July 2018. The workshop part of the session will work through case studies designed to draw out the issues identified in the lecture with a focus on how to practically prevent or correct Division 7A problems.	Andrew Noolan, CTA, Brown Wright Stein Lawyers
4.15pm–5.15pm	Session 7: Facilitated case study discussion	Andrew Noolan, CTA, Brown Wright Stein Lawyers
5.15pm	Networking drinks	



Presenter profiles

An overview of our *experts*

Michael Cox advises clients on designing and operating their tax reporting and compliance processes through a combination of strategy, people, processes and technology. In this role Michael has lead a series of Tax Data Academies designed to equip tax professionals with skills needed to operate in the tax function of the future. He has firsthand, practical experience in building and managing offshore delivery centres, deploying a variety of technology solutions both for both PwC and its clients, as well as over 10 years of experience in providing domestic and international tax advice.

Steve Healey, CTA-life, is a partner with Grant Thornton and leads the tax and private advisory service lines for the firm in Australia. He has in excess of 23 years professional experience advising some of Queensland's largest listed and government-owned entities and transactions in addition to advising many privately owned enterprises. Steve was President of the Tax Institute in 2015 and is also a member of the Advisory Panel to the Board of Taxation.

Dominic Moon,CTA, is a Solicitor with expertise in taxation, estate planning and commercial law. Dominic's strength is in his ability to research, comprehend and implement complex transactions for his clients with a focus on achieving strong commercial and taxation outcomes. Over the past few years, he has built a substantial following of Accountants and Financial Planners who rely on his technical expertise to service the needs of their clients. While Dominic has worked across many different industries, he has developed specialised knowledge in professional services, pharmacy, transport and extractive industries.

Andrew Noolan,CTA, is a Partner in the Sydney law firm Brown Wright Stein Lawyers. His clients are accountants and lawyers in public practice that require advice on tax issues impacting on their clients. Andrew specialises in tax issues common to the SME and high-wealth individual sectors.

Further Information

What, when and *how to*

Online registration

Delegates are encouraged to register online at taxinstitute.com.au/SMESymposium

Full Registration

This registration option entitles one delegate to attend all sessions and includes refreshments during conference hours. Select your session choices on the registration page.

Papers

The Tax Institute understands the impact that an event of this nature has on the environment, especially when printing delegate materials. Full technical papers and PowerPoint presentations will be available online to all participating delegates to download approximately five days before the event. Once these are available an email will be sent to delegates with access details.

CPD app

The Tax CPD app will be available for download one week prior to the event. The app will contain session and speaker information, the delegate list and available technical materials. You will receive instructions via email detailing how to download the app.

Employer Ticket

Register up to 3 delegates from the same firm and select the sessions that are most relevant. The names of all attendees and the sessions they will be attending must be submitted on the employer ticket registration form. A confirmation letter for each attendee will be emailed to the employer ticket coordinator. For an employer ticket registration form, please call 02 8223 0040.

Group discount

Purchase three full conference registrations and receive the fourth registration free. All attendees must be from the same firm and all registration forms must be submitted at the same time.

Venue

Perfectly positioned in the heart of Sydney's CBD, Primus Hotel Sydney is at the epicentre of entertainment, history and retail with Town Hall, iconic Hyde Park, Queen Victoria Building, St Mary's Cathedral and emerging Korea town on its doorstep.

With the Sydney Harbour Bridge, Opera house and Rocks district only a short stroll and easy public transport options to the International and Domestic airport, Primus Hotel Sydney is the ideal choice for leisure and business guests.

Dress code

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

Alteration and cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. It is a condition of acceptance of registration that an administration fee of 20% of the registration fee will be charged for cancellation. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated; however, the replacement is only valid for the 2017 SME Symposium. 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.

Enquiries

For further information regarding this event, please email nsw@taxinstitute.com.au. For registration enquiries, please contact eventregistrations@taxinstitute.com.au.

Confirmation of registration

A confirmation letter and tax invoice will be sent via email.

CPD accreditation

Attendance at the conference counts for 7 structured hours of Continuing Professional Development.

Become a member

There is no time like the present to join Australia's premier tax body and take advantage of the special new member introductory offer. For an additional \$320 on the member registration fee you will receive membership until June 2018. Benefits include:

- *Taxation in Australia* journal
- *TaxVine* e-newsletter
- TaxLine Research Service – free to members
- CPD event discounts
- Publications and tax product discounts
- Business Alliance Partner discounts.



THE TAX INSTITUTE

Event Registration Form

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A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

Date of issue: September 2017

1 Registration

Full conference

Please see page 6 for registration inclusions.

	Early bird full registration (Register on or before 13th October 2017)	Standard full registration (Register after 13th October 2017)
Member Full Day	<input type="checkbox"/> \$595	<input type="checkbox"/> \$695
Non-Member Full Day	<input type="checkbox"/> \$795	<input type="checkbox"/> \$895
New Member Full Day	<input type="checkbox"/> \$915	<input type="checkbox"/> \$1015
Employer ticket	<input type="checkbox"/> \$950	

- I understand that the registration fees do not include printed materials. Access to materials will be electronic.
- Add printed materials (\$50).

Dietary requirements:

*EVENT AND MEMBERSHIP OFFER

There is no better time than right now for non-members to take up membership! Register at the Member rate + add on \$320 for Membership and receive member benefits through to 30 June 2018. All new members are eligible to 'upgrade' their membership level at no additional cost by providing the appropriate documentation when applying within the initial membership subscription period.

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character and agree to be bound by the Constitution of The Tax Institute. Further information available at taxinstitute.com.au

Signature:

Date of signature:

Promotional code:

2 Delegate contact details

Member no.:

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

Title: Mr Mrs Miss Ms Other (please specify)

Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb:

State:

Postcode:

Telephone:

Fax:

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 purposes.

3 Payment summary

Registration fee

\$

Total payable

\$

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

Replacements

Please note: Registrations for the event are not interchangeable but replacements are acceptable. Please notify us at least two days prior if you intend on sending a replacement. CPD hours will be allocated to the designated attendee. If the replacement is not a member, the non-member registration fee will apply.

Cancellations

The Tax Institute must receive cancellations in writing five working days prior to the conference. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. Further details on The Tax Institute's cancellation policy can be found at taxinstitute.com.au.

4 Payment method

Cheque payable to The Tax Institute (in Australian dollars)

Credit card \$

Card type: AMEX Visa MasterCard Diners

Expiry date:

Name on card:

Card no.:

Cardholder's signature:

Membership and education program promotion

- I am interested in becoming a member of The Tax Institute. Please send me further details.
- I am interested in learning more about The Tax Institute's education program. Please contact me.

Marketing and business alliance partner exclusions

- I no longer wish to provide my contact details to The Tax Institute's contracted business partners.
- I no longer wish to receive marketing correspondence from The Tax Institute.

We take your privacy seriously, and our policy can be viewed at taxinstitute.com.au/go/footer/privacy.

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. TTI collects, uses, holds and discloses your personal information (including sensitive information, such as health information) for a range of purposes, such as administrative purposes relating to membership of TTI and TTI's courses (including assessment of eligibility and providing courses), compliance with Government and statutory requirements, provision of information relating to TTI's services and member benefits and to conduct market research. If you do not provide the personal information requested by TTI, it may not be able to provide its services to you, such as assessment of your course enrolment application. TTI does not disclose criminal record information to third parties. TTI usually discloses your personal information to entities such as your sponsoring employer (with respect to your course records and results), The Tax Practitioners Board, TTI's business partners for marketing purposes, IT companies and other companies who provide administrative and other services to TTI and government bodies, such as the Tertiary Education and Quality Standards Agency. TTI may disclose personal information to overseas recipients in countries such as the United States of America and India. For further information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. The Privacy Policy also contains information on how to request access to or correction of your personal information and how to make a complaint about a breach of privacy. By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties as set out in this notice and in accordance with TTI's Privacy Policy. If you do not want your personal information to be used by TTI or disclosed to third parties, for the purpose of direct marketing, please contact us in writing at membership@taxinstitute.com.au.

TO REGISTER

🔗 Online taxinstitute.com.au/smesym

✉ Mail GPO Box 1694 Sydney, NSW 2001

@ Email eventregistrations@taxinstitute.com.au

☎ Fax 02 8223 0077