

Death & Taxes Conference

10–11 October 2024

The Calile, Brisbane & Online

12 CPD hours



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

Todd Bromwich, Hall & Wilcox, Chair, Death & Taxes Conference Organising Committee

Neal Dallas, CTA, BusinessDEPOT

Yikai Hoe, CTA, Provident Lawyers

Ann Janssen, ATI, Estate First

Jonathan Larosa, William Buck

Archana Manapakkam, Velocity Legal

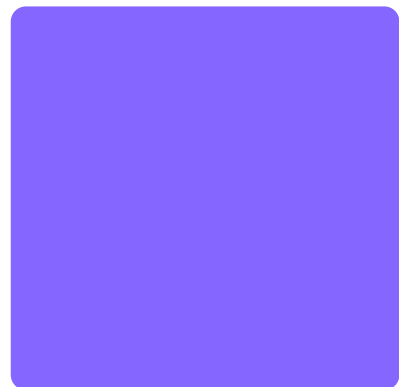
Katerina Peiros, ATI, Hartwell Legal

Nathan Yii, CTA, Nathan Yii Lawyers

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ESTATEXCHANGE





Welcome

Australia's leading estate taxation and administration conference, a 'must' attend event for all practitioners is back in Brisbane this year.

Ageing client bases, increased complexities of asset holdings and family arrangements and the highest ever intergenerational wealth transfers are just a few reasons why it is essential for practitioners to invest time in developing an understanding of the taxation of deceased estates.

Deceased estates continue to be an important market and opportunity for many professionals, but equally one that has seen an unprecedented growth in litigation. Therefore it presents prominent risks that practitioners must manage.

This year's organising committee have worked hard to put together a program of current and relevant topics for a range of practitioners. This labyrinth of estate planning issues include sessions on foreign beneficiaries, dodgy Testamentary Discretionary Trusts, superannuation issues in the estate plan, State Taxes issues and more.

Join us in October at The Calile in Brisbane or online for a two-day expansive technical program with industry experts from across the nation.

We look forward to seeing you in October again for this wonderful annual event.



Todd Bromwich
Chair, Death & Taxes Conference Organising Committee

Early bird pricing offer
Register on or before Friday, 13 September 2024 to save!

Technical program

Day 1 Thursday, 10 October 2024

| Time *AEST | Session |
|-------------------|--|
| 8:30 – 9:20am | Registration |
| 9:20 – 9:30am | Welcome and Opening Address |
| 9:30 – 10:30 am | <p>Session 1: Foreign beneficiaries in the estate plan Speaker: Paige Edwards, FTI, McCullough Robertson, David Hughes, CTA, McCullough Robertson</p> <p>It is increasingly common that Australian deceased estates will have an international ‘flavour’. The most common issue that arises is that foreign individuals will have an entitlement to a specific bequest or share of the residuary of the estate.</p> <p>Despite Australia no longer having estate or gift taxes, the presence of foreign beneficiaries can give rise to some particularly complex issues for executors and their advisors. This session will focus on the common issues advisors see in practice and how to address them, including:</p> <ul style="list-style-type: none">• The potential application of CGT event K3 to gifts to foreign beneficiaries• Managing testamentary trusts with foreign beneficiaries• Gifts of real property to foreign beneficiaries (including the duty and Foreign Investment Review Board implications); and• Achieving equity and giving effect to the willmaker’s intentions, where beneficiaries face differing tax outcomes. |
| 10:30 – 11:00am | Morning tea |
| 11:00am – 12:00pm | <p>Session 2: Managing foreign bequests and legacy structures Speaker: Neil Brydges, CTA, Sladen Legal, Marsha Dungog, Withers Worldwide</p> <p>Australia is a popular migration destination, with more than 30% of residents being born overseas. When they or their offshore relatives pass away, advisors are often left to navigate the Australian (and foreign) tax implications of managing or winding up offshore ‘legacy’ structures.</p> <p>In this panel session, our presenters will try to answer some of our clients’ burning questions (and those from the audience), including:</p> <ul style="list-style-type: none">• All gifts and inheritances are tax-free...right?• What if my parents held all their wealth in offshore companies and trusts?• Can I just receive and leave the assets overseas, and forget about Australian tax?• What happens if I take over as director/shareholder/trustee/partner of this overseas entity? And what if I already did that 12 months ago? and• Mum had Australian and USA wills, but Dad had a global will? What does that even mean and does it matter? |

Technical program

Day 1 Thursday, 10 October 2024 continued

Time *AEST

Session

12:00–1:00pm

Session 3: Trusts of the rich and the famous

Speaker: Bill Orow, Victorian Bar

This session will explore a number of trust disputes involving high profile families and analyse how they managed (or mismanaged) their trusts. Hear from our expert presenter on the lessons learnt and navigate through the twists and turns of these fascinating cases.

The purpose of this session is to consider recent significant decisions (appellate level) that bear on the administration of trusts including:

- Vanta Pty Ltd v Mantovani – [2023] VSCA 53
- Cardaci v Cardaci [2023] WASCA 158
- Owies v JJE Nominees Pty Ltd [2022] VSCA 142
- Twigg v Twigg [2022] NSWCA 68

And others of interest:

- Re The Pickering Family Trust [2024] VSC 5; and
- Glideware Pty Ltd v Hadad & Anor [2024] VSC 34.



Technical program

Day 1 Thursday, 10 October 2024 continued

| Time *AEST | Session |
|---------------|---|
| 1:00 – 2:00pm | Lunch |
| 2:00 – 3:00pm | <p>Session 4: Dealing with dodgy testamentary discretionary trusts Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers</p> <p>Testamentary Discretionary trusts (TDTs) are becoming more and more prevalent in our client’s estate plans due to their flexibility and potential tax benefits. But are all TDTs created equal?</p> <p>In this session we will identify the key deficiencies to look out for in TDTs that could cause grief once your client dies and you are left to administer the TDT in their Will. This session will discuss the various options available to the most common problems you may encounter as an advisor when endeavouring to administer these trusts post death, including whether the TDT should even be utilised at all. The discussion will include the tax and stamp duty consequences, as well as the legal issues involved in the various option.</p> |
| 3:00 – 3:30pm | Afternoon tea |
| 3:30 – 4:30pm | <p>Session 5: Practical trusts Speaker: Dung Lam, CTA, West Garbutt</p> <p>Australia is thought to have one of the highest number of private trusts (and, in particular, discretionary trusts) per capita in the world. An advisor practising in the estate planning and deceased estates space will therefore invariably come across inter vivos discretionary trusts established by a Willmaker/deceased during the course of their practice. This session is aimed at providing practical tips and tricks (taking into account tax considerations) for advisors dealing with succession planning and trust administration issues in respect of such trusts, including:</p> <ul style="list-style-type: none">• Passing on control of the trust to the next generation• Restructuring the trust to divide wealth between members of the next generation, including the difference between trust splitting and trust cloning• Dealing with the trust as part of a deed of family arrangement• Varying the trust deed and issues to watch out for from a stamp duty perspective where the trust owns land; and• Vesting the trust. |

Technical program

Day 1 Thursday, 10 October 2024 continued

Time *AEST

Session

4:30 – 5:30pm

Session 6: The conflicted adviser

Speaker: Karen Gaston, Hemmant's List

Professionals often find themselves being elevated to the position of trusted adviser for a family group, particularly for long-standing clients. Whilst there are benefits in knowing a family's history and individual circumstances intimately, advisers may find themselves navigating a difficult middle ground when tensions arise. This session explores several key areas:

- How advisers should address conflicts of interest when acting for a family group
- Deciding whether to take on such roles as executor, attorney, trustees, director or similar positions when acting for a family group
- Involvement in assisting family groups through discretionary decisions involving superannuation death benefits or trust distributions
- Recognising early signs of a client's potential loss of capacity, and the appropriate protective actions for both client and adviser; and
- Determining when it is appropriate to continue serving in an advisory capacity, and when it is better to step aside.

Through practical case studies, the session aims to equip advisers with insights and strategies for managing these complex situations effectively.

5:30pm

Networking function



Networking function

Join your colleagues and speakers for an evening of drinks, canapes and networking.

Date: Thursday, 10 October 2024

Time: 5:30–7.30pm

Venue: The Calile Hotel

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

Dress: Business casual

Technical program

Day 2 Friday, 11 October 2024

| Time *AEST | Session |
|-----------------|--|
| 8:30 – 9:45am | <p>Session 7: Tax planning with deceased estates – The integrity approach Speaker: Joanne Casburn, FTI, Mage Advisory and Waterhouse Lawyers</p> <p>As there are currently no death taxes in Australia, many would regard it to be a great tax planning opportunity where a deceased estate is involved. However, how effective can this tax planning strategy be? In this session we will evaluate some common tax integrity provisions such as Part IVA, s 100A, 100AA, 100AB, fraud or evasion findings, that arise in the context of deceased estate administration (and ancillary matters) and discuss how practitioners and taxpayers can ‘swim between the flags’ when navigating these complex concepts.</p> |
| 9:45 – 10:30am | <p>Session 8: Div 296 and other super issues affecting the estate plan Speakers: Neal Dallas, CTA, BusinessDEPOT, Victoria Mercer, BusinessDEPOT</p> <p>Superannuation remains a pivotal element in discussions concerning estate planning and taxation. This session aims to explore both current and emerging issues in superannuation that are critical for advisors, including:</p> <ul style="list-style-type: none">• An examination of the expected operation of the proposed Division 296 Taxation on its implications on estate planning and administration• Withdrawal and recontribution strategies, the related anti-avoidance regulations, and insights into the ATO’s stance• Lifetime pre-death withdrawals and comparisons between APRA funds and SMSFs in managing near-death benefit payments, particularly in the debate over member benefits versus death benefits; and• Ensuring superannuation remains as tax-effective as possible in the estate plan during one’s lifetime and on death. <p>The goal of this session is to equip professionals with the knowledge to effectively address and navigate these superannuation-related current and emerging issues in estate planning.</p> |
| 10:30 – 11:00am | Morning tea |



Technical program

Day 2 Friday, 11 October 2024 continued

| Time *AEST | Session |
|-----------------|--|
| 11:00am-12.00pm | <p>Session 9: Common state tax issues in estate administration Speaker: Tom Walrut, FTI, Cooper Grace Ward Lawyers</p> <p>This session will explore common State Tax issues that arise in estate administration, including:</p> <ul style="list-style-type: none">• Passing real estate from deceased to beneficiary, is there a stamp duty exemption in every jurisdiction?• Holding real estate in estates – land tax consequences, timeframes and rates• Getting real estate or land rich units/shares out of SMSFs:<ul style="list-style-type: none">– To member in retirement phase or accumulation phase but of preservation age– to estate or beneficiary pursuant to a nomination or determination of a trustee• Land tax payable by SMSFs in administration phase• Tax consequences of getting non land rich assets out of SMSFs• Getting assets out of trusts on vesting, is there a stamp duty exemption in every jurisdiction; and• Any other jurisdiction specific nuances. |
| 12:00-1:00pm | <p>Session 10: The gift of life estates Speaker: Bryan Mitchell, FTI, Mitchells Solicitors</p> <p>In this session, we will examine the difference between a life tenancy and a right to reside in a property and why the distinction can be important.</p> <ul style="list-style-type: none">• Differences between surrender and disclaimer and cash out• Different tax consequences of the above depending on what administration phase its done in• How life interests are reflected on land titles or portfolios• How are expenses paid on life interests involving assets that cost to maintain• Substitution of assets in life interests• Land tax and CGT on life interests at termination, vesting, surrender, disclaimer, cash out, etc• Obligations and liability of trustee• Difficulties where the trust is unfounded• Pitfalls of Settled Land Act in Victoria; and• Main ATO IDs on this topic, TR 2006/14. |
| 1:00-2:00pm | Lunch |

Technical program

Day 2 Friday, 11 October 2024 continued

| Time *AEST | Session |
|---------------|--|
| 2:00 – 3:00pm | <p>Session 11: Dealing with digital assets in deceased estates – Current issues and state of play Speaker: Lisa Barca, Turner Freeman Lawyers</p> <p>This session will explore specific issues with digital assets [and the digital economy?] in the administration and taxation of deceased estates, including:</p> <ul style="list-style-type: none">• What are the more common types of digital assets that an Executor may need to deal with in a deceased estate? [Summarise the meanings of cryptocurrency, stablecoins, NFTs, wrapped tokens, staked tokens, digital wallets, DeFi transactions, metaverse rights?, DAO tokens]• Practical taxation examples, including:<ul style="list-style-type: none">– How do Executors account for and manage taxation on digital assets that were acquired for 1c per token [or for free via airdrop?], and are now valued at more than \$10 per token?– How do Executors account for and manage taxation on digital assets that were acquired for \$10 per token, and are now valued at less than 1c per token?• When may an Executor need to deal with digital assets held in separate trusts or other entities? What practical and taxation issues can arise? [E.g. Identify any uncertainty over who holds digital assets? Private use of digital assets owned by companies (Division 7a?)]• Can digital assets be settled on a testamentary trust? [Address whether a minor can own or hold a digital asset, and receive income from a digital asset?]• Can digital assets be transferred in-specie to estate beneficiaries?• What can an Administrator do if they cannot access a digital asset? and• What are an Executor’s obligations if the deceased was a DAO token holder? |
| 3:00 – 3:30pm | Afternoon tea |
| 3:30 – 4:30pm | <p>Session 12: Current issues and hot topics in practice Speakers: Paul Banister, CTA, Grant Thornton, Julie Van der Velde, CTA, TEP, VdV Legal, Chair of STEP Australia</p> <p>For the final session of the conference, we will host a topical panel discussion with our esteemed presenters regarding some of the hot topics and key practical issues in estate administration.</p> |
| 4:30pm | Conference close |

Presenters

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, a member of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser and member of the Dispute Resolution Technical Committee with The Tax Institute.

Joanne Casburn, FTI, is a Specialist Advisory at Mage Advisory and at Waterhouse Lawyers, a boutique tax law firm, specialising in tax dispute resolution and litigation, including recent disputes involving trust issues such as section 100A, section 99B and Part IVA. She has over 30 years of experience, with 10 years as a former ATO Assistant Commissioner. In the ATO, Joanne who was responsible for the leadership of the private wealth audit teams in Queensland including Part IVA matters that have recently been decided in the Federal Court. Joanne was recognised in 2020 as a finalist in The Tax Institute's SME Tax Adviser of the year awards. She is also a State Councillor for the Queensland Branch of The Tax Institute.

Neal Dallas, CTA, is the Legal Director at BusinessDEPOT. He has extensive experience advising clients in the areas of superannuation, tax, estate planning and asset protection. He is recognised in the 2025 Edition of Best Lawyers in Australia in the areas of Superannuation Law, Tax Law, Trusts and Estates, and Wealth Management/Succession Planning Practice.

Marsha Dungog is a partner in the private client and tax team and is the Office Managing Director of the San Francisco Office. Marsha provides US international income, trusts and estate tax planning for high net worth individuals, and family businesses based in the US and abroad with respect to their cross-border assets, investments and activities. She also advises trustees, executors and fiduciaries as well as financial, tax and legal advisors on international tax exposures and reporting obligations for beneficiaries and heirs of trusts and estates with US connections. Marsha's practice includes US tax planning for foreign investors, founders and entrepreneurs deriving income from US-based sources and operations, as well as tax advisory services for foreign legal, financial and tax advisors on the US taxation of foreign pensions and retirement arrangements, US-based investments and exit strategies for corporate executives, global

employees and US persons living abroad. She is an author and frequent speaker on international tax issues. Marsha has published tax technical papers that have been presented to the tax-writing committees of the US Congress and the US Treasury Department on the US taxation of Australian Superannuation Funds, Mexican AFOREs and Canadian registered plans (RESPs and RDSPs). She has also spoken at international conferences and seminars in the US, Canada and Australia on the US taxation of foreign pensions and retirement, cross-border estates and trusts, international withholding and compliance enforcement initiatives, IRS voluntary disclosure programs and U.S. expatriation and green card termination alternatives. Prior to joining Withers, Marsha was a director at a large accounting firm in San Francisco providing international tax consulting and compliance services to high net worth clients with a global footprint, businesses and entrepreneurs. She also worked in Canada providing US tax advisory and compliance services for global high net worth individuals, cross-border families and businesses. Marsha is a public arbitrator for the US Financial Industry Regulatory Authority (FINRA) and instructor in US international tax for the American Institute of Certified Public Accountants (AICPA). In 2018,

she was recognized by the Canadian Business Chicks as a Woman of Inspiration (Authentic Leader Category) and in 2020, by the California Society of CPAs as a Woman to Watch (Experienced Leader Category).

Paige Edwards, FTI, is a Special Counsel in the Estates team and a Queensland Law Society Accredited Specialist in succession law. Paige practices primarily in estate planning and structuring for high net worth clients, blended families, families with children with special needs or individuals with difficult personal situations. Paige supports a diverse range of clients, including individuals, trustee companies, law firms, charities, government organisations, accountants and financial advisers, frequently providing strategic support preparing family constitutions, restructuring entities, implementing advisory boards and advising trustees. Her expertise includes transitioning family wealth, complex estate planning, and handling trust matters such as charitable trusts, superannuation funds, family trusts and special disability trusts.

David Hughes, CTA, is a Partner at McCullough Robertson and a Queensland Law Society Accredited Specialist in taxation law. David acts for clients throughout Australia and offshore in

Presenters

relation to navigating cross-border taxation issues, including structuring advice and taxation disputes with the ATO, including audits, objections and running appeals in the High Court, Federal Court and the Administrative Appeals Tribunal against excessive tax assessments. David has also taken court action to prevent the ATO from taking illegal enforcement action, including successfully overturning departure prohibition orders.

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.

Victoria Mercer is an Associate Lawyer in the Wealth Advisory Division at BusinessDEPOT (Legal), specialising in complex estate planning, self-managed superannuation, and strategic tax planning. Her practice focuses on serving high net worth individuals, business owners and blended families. Victoria distinguished herself academically by earning the title of Dux in her Advanced Superannuation during her Graduate Diploma of Applied Tax at the Tax Institute in 2023. In 2022, Victoria was nominated as a 'Rising Star' in the Queensland Wills and Estates Law category for the leading industry publication Doyle's Guide and regularly presents at industry conference including the SMSF Association, Legalwise and The Tax Institute. As a trusted advisor, Victoria relishes the opportunity to tackle complex family dynamics and structures, helping families transition their wealth to the next generation.

Bryan Mitchell, FTI, is the managing director of Mitchells Solicitors. He is an Accredited Specialist in Succession Law and a full member of the Society of Trust & Estate Practitioners ("STEP"). Bryan & his firm are recognised leaders in Estate Planning and Estate Litigation in Australia.

His practice works almost exclusively in the areas of Wills, Estates, Trusts & Elder Law. Bryan is a regular presenter. He is the recipient of the STEP Australia Masters Award 2023; immediate past Chair of STEP Australia; former Chair of STEP Queensland; Deputy Chair for the Queensland Law Society ("QLS") Succession Law Policy Committee; Deputy Chair of the QLS Succession Law Specialist Accreditation Advisory Committee; and member of the University of Queensland Law School Advisory Board.

Bill Orow is an expert in the fields of taxation law, superannuation and trusts holding a Ph.D as well as an LL.M and has had many works on taxation published, including "Comparative Anti-Avoidance Rules" Jordans, UK and "Income Tax and GST Planning Strategies", Australian Tax Practice, which he co-authored. He practices in Federal and State taxation and has been briefed in matters involving income taxation, GST, superannuation, stamp duty, land tax, general infrastructure contribution tax and payroll tax.

Linda Tapiolas, CTA, is a Partner in the Cooper Grace Ward Lawyers Commercial team. She provides a range of support services to accountants, financial planners, and other professional advisers. This includes technical advice on complex tax, CGT and Div 7A issues,

as well as acting on business sales and acquisitions to ensure clients achieve commercial and tax-effective outcomes. Prior to joining Cooper Grace Ward, Linda worked as an accountant for 18 years advising clients on capital gains, business acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions.

Julie Van der Velde, CTA TEP is the principal of a specialised commercial law firm, VdV Legal. With over 25 years' experience advising Australian businesses, her practice focuses on taxation and trust law with an emphasis on business structuring, tax planning, business succession and intergenerational transfers. Julie is The Tax Institute's SME Chartered Tax Adviser for 2017 and was recently appointed Chair of STEP Australia.

Tom Walrut, FTI, is a Senior Associate at Cooper Grace Ward Lawyers experienced in providing tax advice to clients on both State and Federal tax issues. Tom primarily works with SME clients in a broad range of industries advising on tax planning, transactional matters, structuring and general commercial matters. He also regularly acts for clients in taxation objections and disputes with both State and Federal Revenue Authorities.

Venue and accommodation



The Calile Hotel

48 James Street, Fortitude Valley, QLD 4006

Located in the city of Brisbane, with direct access to restaurants, shopping and bars, The Calile Hotel features an outdoor pool, fitness centre and spa facilities. You can complete your Brisbane experience with visits to the city's art galleries, museums and the CBD, all within a short drive from the property.

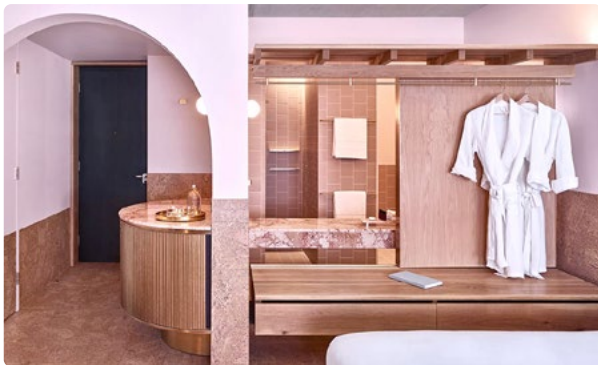
Create memorable moments in time at The Calile Hotel. Enjoy the many facilities at the property, including the four on site restaurants Lobby Bar, Hellenika, SK Steak & Oyster and Sushi Room. Relax with a cocktail in a poolside cabana or at the hotel's spa facilities, which provide a holistic wellness experience with modern approaches to skin health, medical aesthetics and beauty essentials.

Favourable room rates have been negotiated, book your accommodation [here](#) and use the discount code: **TAX101024**

Getting to The Calile Hotel

The resort is located at 48 James Street, Fortitude Valley and is approximately a 20 minute drive from the Brisbane Airport. The hotel is located a short ten-minute walk from the Fortitude Valley Train Station and is directly adjacent of the James Street 8A bus stop.

The Calile Hotel has secure carparking available from 6:00am – 12:00am for \$25/day for guests or valet parking available for \$45 p/day.



Event information

Networking function | Thursday, 10 October 2023

The networking function is included in the registration fee for delegates attending the full conference. The networking function includes stand-up canapes and drinks.

Additional tickets are available to purchase for accompanying persons at a cost of \$80. Please indicate your requirements, including dietary requirements, at the time of registration.

Registration inclusions

Full event registration includes participation in the technical program, electronic access to all available materials via the Death & Taxes Attendee Hub, attendance at the networking function on Thursday evening and all refreshments during convention hours. Registration fees do not include travel, accommodation, or hotel incidentals.

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 conference.

Special dietary and accessibility requirements

Networking function – Calile Hotel

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. The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

Privacy

We take your privacy seriously, and our policy can be viewed at: <https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer>.

Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or nationalevents@taxinstitute.com.au.

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

Registration

Registration inclusions

| | Online access to presentations and technical papers | Morning/ afternoon tea/ conference lunches | Networking function* |
|---|---|--|----------------------|
| Full registration This registration option entitles one delegate to attend the entire event. | ✓✓✓ | ✓✓✓ | ✓✓✓ |
| Online full registration This registration option entitles one delegate to attend the entire event. | ✓✓✓ | | |

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

Discounts

Early bird registration

All registrations received and paid on or before Friday, 13 September 2024 will be entitled to an early bird discount.

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.

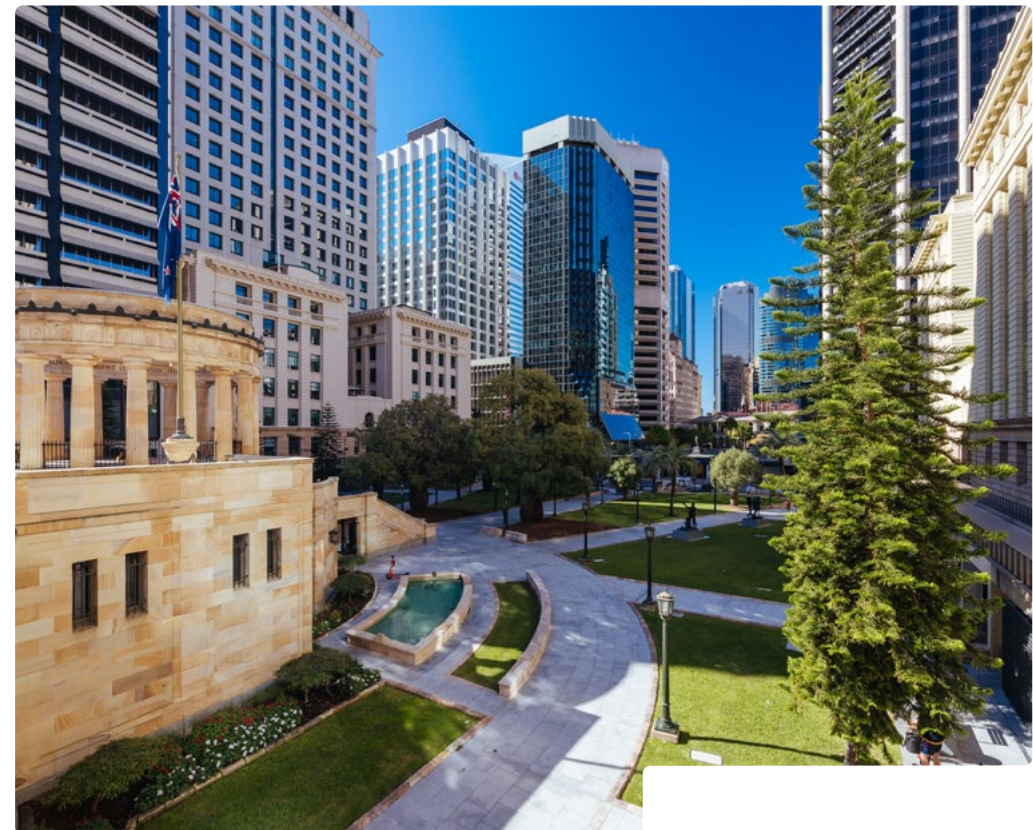
This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

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, 13 September 2024 | <input type="checkbox"/> \$1,700 | <input type="checkbox"/> \$2,090 | <input type="checkbox"/> \$2,000 |
| Standard registration Register after Friday, 13 September 2024 | <input type="checkbox"/> \$1,900 | <input type="checkbox"/> \$2,290 | <input type="checkbox"/> \$2,200 |

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

Online registration – 12 CPD hours

| | Member | New member* | Non-member |
|---|----------------------------------|----------------------------------|----------------------------------|
| Early bird registration Register on or before Friday, 13 September 2024 | <input type="checkbox"/> \$1,700 | <input type="checkbox"/> \$2,090 | <input type="checkbox"/> \$2,000 |
| Standard registration Register after Friday, 13 September 2024 | <input type="checkbox"/> \$1,900 | <input type="checkbox"/> \$2,290 | <input type="checkbox"/> \$2,200 |

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

Networking function

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

Thursday: 10 October 2024 – The Calile Hotel

- Yes, I WILL be attending the networking function OR
 No, I WILL NOT be attending the networking function
 Yes, I require additional tickets for the networking function 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 \$220 on 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





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:



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