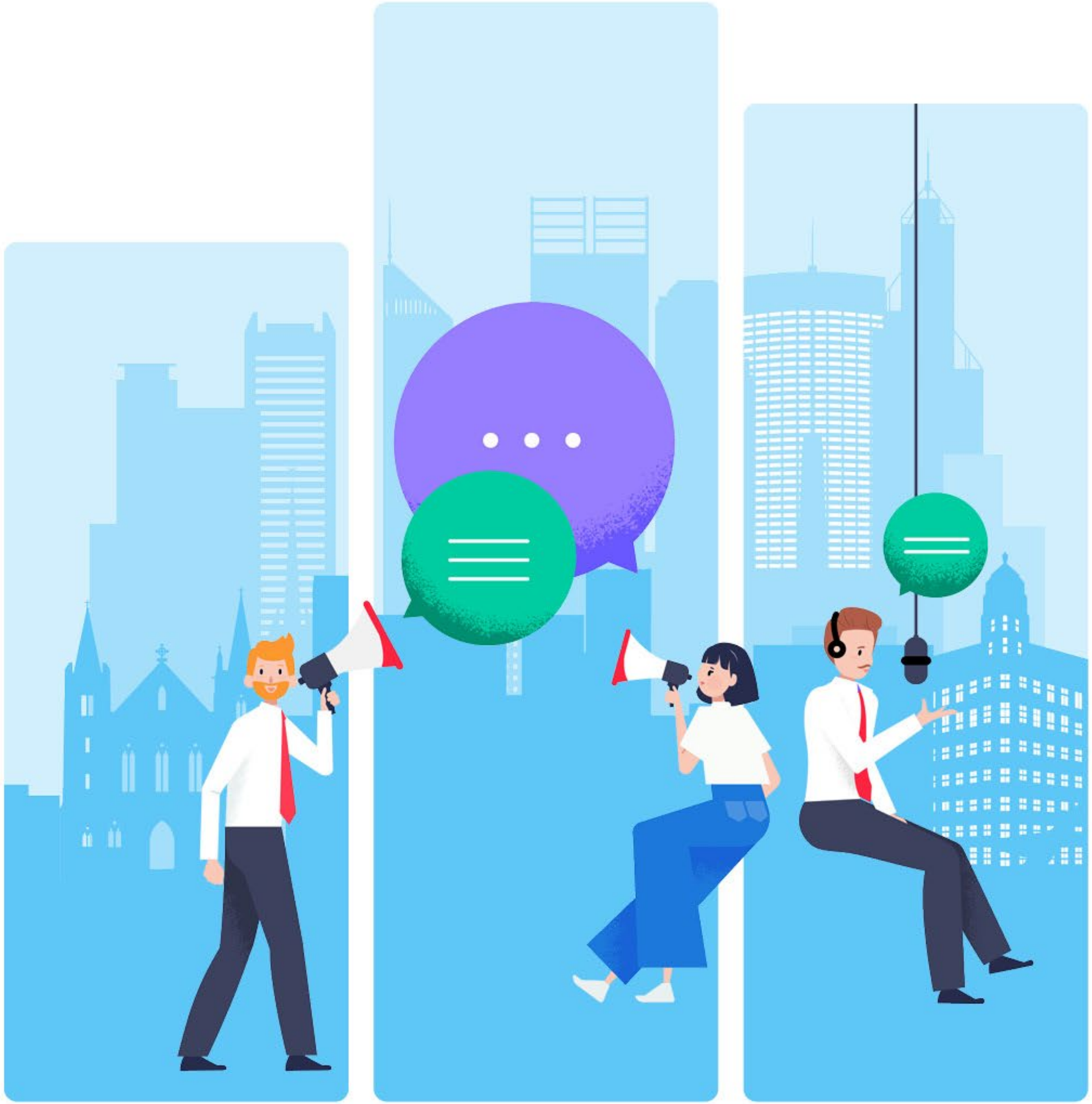
The Tax Institute

WA Tax Forum

7–8 March 2024

Hyatt Regency Perth

12 CPD hours



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

Modiesha Stephens, CTA, MS Legal (Chair of the Organising Committee)

Simeran Cheema, CTA, RSM Australia

Mike Cooper, CTA, Australian Taxation Office

Tracey Dunn, EY

Billy-Jo Famlonga, FTI, Famlonga Business Services

Yikai Hoe, CTA, Provident Lawyers

Alan Krawitz, CTA, Smailes Krawitz

Annette, Morgan, CTA, Curtin University

Rachael Munro, CTA, PwC

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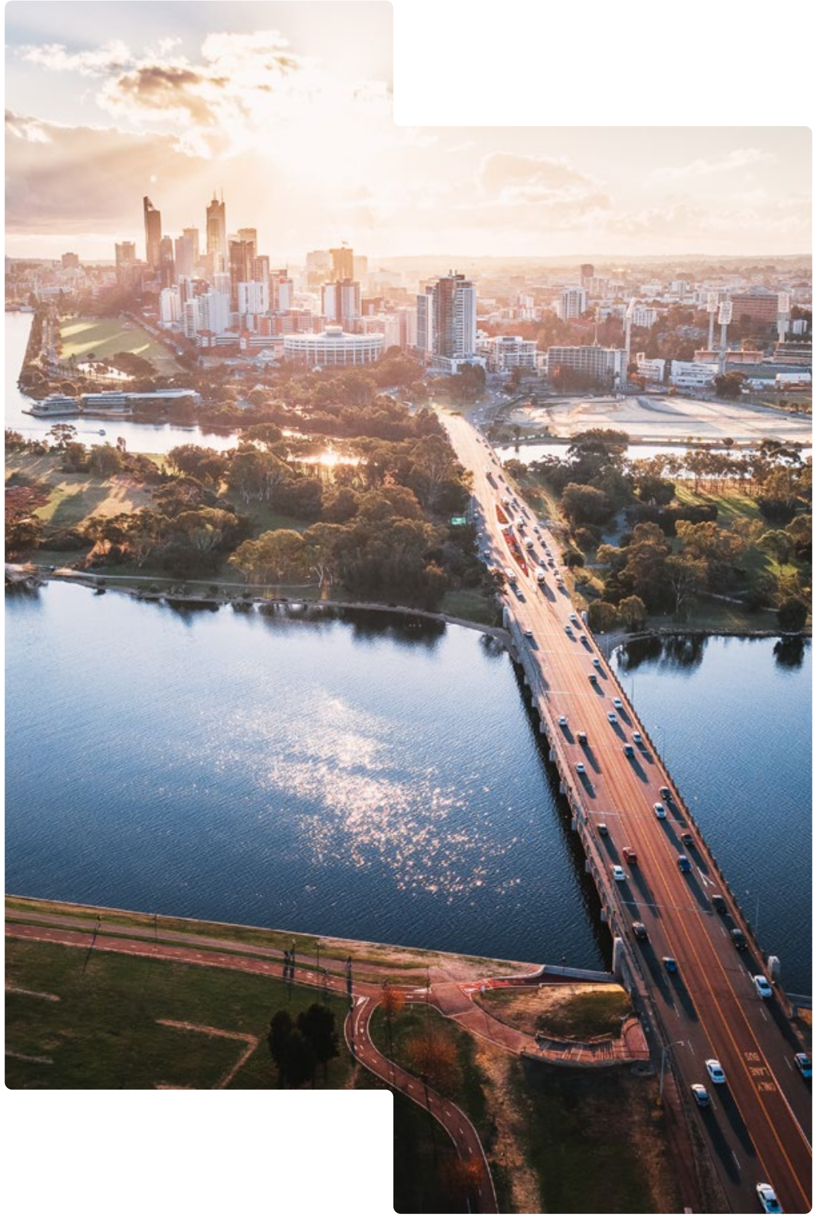


Welcome

On behalf of the organising committee and The Tax Institute, it is my pleasure to invite you to the WA Tax Forum to be held on 7-8 March 2024.

The WA Tax Forum is the most expansive tax program on the WA CPD calendar and the leading CPD event for WA's tax profession. In 2024, we have revamped the program to provide a greater emphasis on the latest developments and hot topics, to ensure delegates stay up to date with our constantly shifting tax landscape.

Once again in 2024, the program features a stellar line-up of interstate speakers including The Tax Institute's **Robyn Jacobson, CTA,** the the ATO's Chief Tax Counsel, **Fiona Dillon, CTA,** and Deputy Commissioner, Objections and Reviews, **Andrew Orme** and **Linda Tapiolas, CTA,** Cooper Grace Ward Lawyers, as well as WA's finest tax minds, to present on issues which are front of mind for all tax practitioners.

The highlights of this year's program include:

- A focus on recent and anticipated changes to the tax landscape including new rulings, case law and legislation
- A fresh look at familiar challenges including Division 7A, the Small Business CGT Concessions and Family Trust Elections
- Dealing with tax disputes and ATO investigations from audit to litigation
- Addressing ATO debt recovery action from payment arrangements and DPNs to winding up applications; and
- Understanding the expectations of the Tax Practitioners Board and your ethical obligations.

This year's program also includes plenty of opportunity to network with practitioners from all corners of the tax profession. This is a wonderful opportunity to connect and collaborate in-person with colleagues, both old and new, in the newly remodelled Hyatt Regency, on the doorstep of Perth's CBD.

Don't miss your chance to be part of this great event! I look forward to seeing you there.

Modiesha Stephens, CTA
Chair, Forum Organising Committee

Early bird pricing offer
Register on or before Friday, 9 February to save!

Technical program

Day 1 Thursday, 7 March 2024

Time AWST	Session	
8:30 – 9:00am	**Registration**	
9:00 – 9:15am	**Welcome and President's address** Speakers: Modiesha Stephens, CTA, Chair, Forum Organising Committee, Todd Want, CTA, President, The Tax Institute	
9:15 – 9:45am	**Session 1: Opening keynote** Speaker: Chris McMahon, Commissioner of State Revenue, RevenueWA	
9:45 – 10:45am	**Session 2A: SMSFs – The latest** Speaker: Jemma Sanderson, CTA, Cooper Partners With the announcement of the new tax on large superannuation balances in February 2023 and the release of draft legislation for the new Division 296 tax in October 2023, there have been many areas of change with respect to superannuation and SMSFs in the past 12 months. Along with other changes and guidance from the ATO on other items, in this session Jemma will provide further detail on the Division 296 tax and other areas of relevance to SMSFs.	**Session 2B: Navigating the digital afterlife – Deceased estates and the challenges of the digital age** Speaker: Tracey Dunn, EY The session will explore the increasing impact of the digital age on the administration and taxation of deceased estates, including: • Understanding digital assets and their significance in estate planning • Digital assets and cryptocurrency: the identification and distribution of cryptocurrency and digital assets in estate administration • Digital assets and testamentary trusts • Privacy concerns and the administration of deceased estates • Understanding the challenges associated with electronic probate and certification of 'original' digital documents • Accessing personal information: password managers, two factor authentication and other barriers to access. • Preparing tax returns for a deceased: accessing a deceased person's tax and superannuation information; and • Remote execution of Wills and the increased challenge to their validity.
10:45 – 11:15am	**Morning Tea**	

Technical program

Day 1 Thursday, 7 March 2024 continued

Time AWST	Session
11:15am – 12:00pm	**Session 3: Walter Gianotti Memorial Address – The tax profession and the ATO working together to resolve tax disputes** **Speaker: Andrew Orme, Australian Taxation Office** This session will discuss developments in tax dispute resolution, including the expansion of small business independent review and updated communication protocols. It will also cover how the ATO and tax practitioners can work together most effectively to resolve tax disputes. This includes what type of engagement supports earlier and more cost-effective resolution, and how the ATO approaches settlements.
12:00 – 1:00pm	**Session 4: The cutting edge of small business CGT concessions – Planning and traps** **Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers** This session will provide practical tips and tricks for planning your small business CGT concessions, with a focus on: • Payment of CGT exempt amounts: Dividend, capital distribution or non-deductible expense • Is the liability "related" to the CGT asset for $6M MNAVT • Aggregated turnover: What income is derived from carrying on business and what income can be excluded • Extracting the proceeds of sale from unit trusts and companies tax effectively • Tips and traps; and • War stories.
1:00 – 2:00pm *Session will commence at 1:15pm*	**Lunch and an Interview with the CEO** Join The Tax Institute's, CEO, Scott Treatt, CTA, for a candid conversation on the future and direction of The Tax Institute. This session will provide an open forum for delegates to raise any issues affecting the tax community.

Technical program

Day 1 Thursday, 7 March 2024 continued

Time AWST | **Session**

2:00 – 3:00pm

Session 5A: Handling a tax dispute from audit to litigation

Speakers: Andrew Giorgi, FTI, Smailes Krawitz, Alan Krawitz, CTA, Smailes Krawitz

This session will provide a practical overview of the tax dispute process including:

- Responding to an ATO audit
- Assessments
- How to draft an objection
- Challenging penalties and interest
- Seeking review at the AAT or appealing to the Federal Court; and
- Differences between the AAT and the Federal Court.

Session 5B: Employment tax compliance in a highly regulated world

Speaker: Gina Nedeljkovic, RSM Australia

Another day, another news article about employers not adhering to their obligations. This session will touch on the changing landscape and focus points of the authorities, including how data analytics is being used to drive audit activity. Specifically, this session will cover:

- Employee v contractor
- Superannuation guarantee vs SG charge
- When SG charge statements are required
- Penalties
- Proposed changes to introduce payday super/overhaul SG charge rules
- Unpaid SG and proposed changes to criminalise wage theft (including impact on advisors who provide payroll services)
- Travel vs living away from home; and
- Compliance with withholding rules under Div 12 of Sch 1 TAA/section 26-105 ITAA 97 – deductibility of payments for work & services.

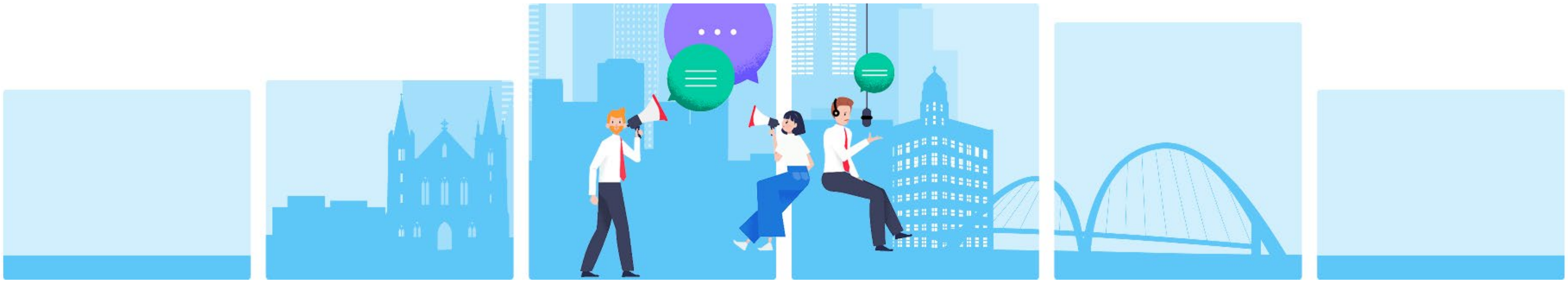
3:00 – 3:30pm **Afternoon tea**

3:30 – 4:30pm

Session 6: Recent cases and significant decisions

Speaker: Clare Thompson SC, ATI, Francis Burt Chambers

This session will discuss and analyse the significant cases and decisions from the past 12-months, the issues they bring to light, and any implications moving forward.



Technical program

Day 1 Thursday, 7 March 2024 continued

Time AWST	Session
4:30 – 5:30pm	**Session 7: ATO debt recovery and your client** Speakers: Sylvia Gallagher, Australian Taxation Office, Travis Kukura, RSM Australia, Shannon O'Connor, RSM Australia, Daniel Taborsky, CTA, Birchstone Tax Law Facilitator: Ross Forrester, CTA, Westcourt In recent months, ATO action on recovery of outstanding tax debts has significantly increased. This has included: • Pursuing ATO debts which had previously been "suspended" • Taking a tougher stance on payment arrangements • Issuing Directors Penalty Notices • Issuing Garnishee Notices as well as Statutory Demands; and • Progressing winding up or bankruptcy applications. In this panel session our industry experts will provide tax practitioners with practical guidance on the key steps to take when your client is facing ATO debt recovery action.
5:30pm	**Welcome reception**

Welcome reception

After a full day of technical toil, join your colleagues and conference speakers for an evening of drinks, canapes and networking.

Date: Thursday, 7 March 2024

Time: From 5:30pm

Venue: Hyatt Regency Perth

Price: Included for full registration delegates
$80 for additional tickets – see registration form for details

Dress: Business or business casual

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Technical program

Day 2 Friday, 8 March 2024

Time AWST	Session
8:30 – 9:00am	**Registration**

9:00 – 10:00am	**Session 8: Division 7A – Just taking it one debit loan at a time**
	Speaker: Robyn Jacobson, CTA, The Tax Institute
	
	Division 7A has been with us for more than a quarter of a century yet, following further refinements to the ATO's treatment of unpaid present entitlements, the operation of Division 7A appears far from set in stone. This session will look at what has changed and what remains the same. Using practical examples, the session will cover:
	• Recap on the policy intent of Division 7A
	• What practically changes following the finalisation of TD 2022/11?
	• How effective are your clients' minimum yearly repayments
	  – Direct set-off against a dividend
	  – Round-robin set-off against a dividend
	  – Circular round of payments by journal entries
	• Consequences of failing to make minimum yearly repayments; and
	• What are your options when you take on a new client and discover debit loans that have not been treated correctly

10:00 – 11:00am	**Session 9: Recent rulings and what's on the ATO's radar** **Speakers: Fiona Dillon, CTA, Australian Taxation Office, Tracey Dunn, EY, David Montani, CTA, Nexia Australia** **Facilitator: Ross Forrester, CTA, Westcourt** 2023 saw some significant developments in a number of areas highly relevant to SMEs and private groups, including the judgments in Bendel, Guardian, and BBlood cases, and the finalisation of the Commissioner's guidance on Sections 109D and 100A. In this session, the panel will discuss what they see as the tax issues that will define 2024.
11:00 – 11:30am	**Morning tea**

Technical program

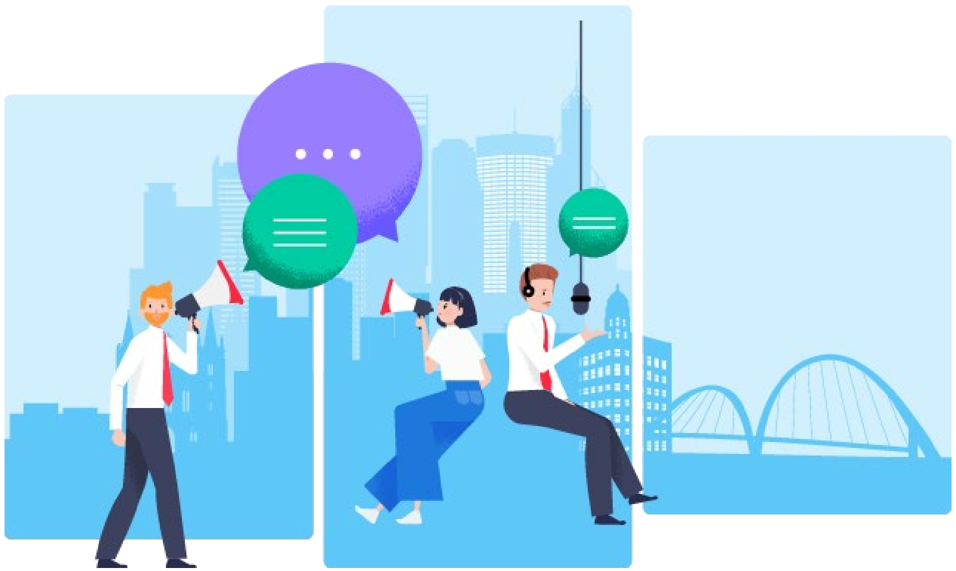
Day 2 Friday, 8 March 2024 continued

Time AWST	Session
11:30am–12:30pm	**Session 10: Family Trust Elections** **Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers** The rules about family trust elections, in particular who is part of the 'family group' and what are 'distributions', are quite complex and commonly misunderstood. A proper understanding of these rules is critical because distributions outside of the 'family group' could result in the family trust distribution tax being triggered. Family trust distribution tax, if triggered, is a debt that is not subject to a review period and for which the entity (which makes the distribution), together with the individuals who are directors or trustees, can be jointly liable. Therefore, it is important that advisers understand the concepts of 'family group' and 'distributions'. This session will cover: • What are the implications of making a FTE or IEE • When is a FTE or IEE required • Requirement to make a valid FTE or IEE (including issues for testamentary trusts in meeting the 'family control' test) • What are 'distributions' • Which individuals and entities are part of the 'family group' • Who is liable for FTDT • What should the trust deed say to help with these issues; and • Passing control of trusts to the next generation
12:30–1:30pm	**Lunch**
1:30–2:30pm	**Session 11: Navigating professional standards in a transformative landscape** **Speakers: Steve Dobson, Board Member of Tax Practitioners Board, Stuart Third, CTA, Downs Accounting** **Facilitator: Robyn Jacobson, CTA, The Tax Institute** The Tax Practitioners Board (TPB) has heightened its scrutiny of high-risk tax practitioners through intensified activities, investigations, and compliance programs. This two-part session will include an update from the TPB on recent law reform and understanding the TPB's expectations. We will also hear from an expert panel, who will discuss your professional obligations under the codes of conduct using real-life scenarios. The panel will address: • Understanding your ethical obligations • Recognising the warning signs – what can be learned from the mistakes of others. • Dealing with the TPB; and • Steps to effectively mitigate risks to you and your clients.

Technical program

Day 2 Friday, 8 March 2024 continued

Time AWST	Session
2:30 – 3:30pm	**Session 12: So your client woke up famous. Now what?** Speaker: Elliott Brannen, Tempo Tax & Accounting Whilst many advisors may have laughed off having a famous client at some point in their career, the reality in 2024 is that fame is a highly sort after commodity and it is likely your fresh-faced teenage neighbour's YouTube channel earns more than your retirement portfolio. From influencers, content creators, artists to e-sports and OnlyFans stars, what do you need to be considering. The session will include: • Defining sources of income and reporting unique income streams • When a hobby becomes a business • Employee or contactor • Deductions and expenses – where do you draw the line, including record keeping and substantiation • International tax considerations; and • Contractual and legal issues.
3:30pm	**Conference close and afternoon tea**



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Elliott Brannen is the Director of Tempo Tax and Accounting, a boutique accounting firm that specialises in the creative industries. He trained as a journalist and worked in media analysis for six years before turning to accounting, working in both Perth and Melbourne, before starting Tempo Tax and Accounting in 2016. A lifelong musician, he has played in bands that have won several music awards, including WA Song of the Year, has toured interstate and overseas, played festivals, and is still active in Perth's live music scene to this day. He is the treasurer and life member of a local youth arts body, currently sits on the board of Perth's biggest community radio station, RTR-FM 92.1 Ltd, has written for The West Australian, and is a regular speaker at music and arts business events.

Fiona Dillon, CTA, is the ATO's Chief Tax Counsel, accountable for the ATO's public advice and guidance, litigation, and resolving the ATO's most significant tax technical issues. Fiona previously served as Minister-Counsellor (Taxation) in the Australian delegation to the OECD based in Paris and spent a number of years in private practice. Fiona is an admitted Australian legal tax practitioner and holds a Bachelor of Commerce, Bachelor of Laws with Honours and a Master of Taxation.

Steven Dobson was appointed to the Tax Practitioners Board in March 2022. He is an experienced government board member and Financial Planner. Steven is the current Chair of Greyhounds WA and a Director with Dobson Financial Planning. Previous governance roles include 10 years with the Small Business Development Corporation of WA as Chair and Board Member, Board Member of the Gaming and Wagering Commission of WA, Member of the ASIC Financial Advisers Consultative Panel and other board roles within the not for profit and sporting community. Steven is a former WA Police Officer, holding a Bachelor of Business from RMIT, a Master of Business Administration from Murdoch University and is a Graduate of the Australian Institute of Company Directors.

Tracey Dunn is as Director with EY, Private – Tax in Perth. Tracey has a Bachelor of Business (Accounting), a Graduate Certificate in Commercial Law, a Bachelor of Laws and a Graduate Diploma in Legal Practice. Tracey was admitted as a lawyer in the Supreme Court of Western Australia in May 2022. Tracey has worked in public practice for over 20 years. Prior to commencing a career in public practice, Tracey worked in commerce in various roles. Tracey's expertise lies in providing both simple and complex tax advice to high wealth high net worth individuals, private groups, small and medium-sized businesses, and corporate entities. She has significant experience in advising on the application of FBT, Div 7A and trusts and regularly presents on taxation topics.

Ross Forrester, CTA, is the founder of Westcourt Family Business Advisors who assist families manage their business assets both in Australia and abroad. He currently sits on the National SME Tax Technical Committee and is the Chair of the WA State Council for The Tax Institute. Ross is also the South East Asian Chair for Geneva Group International's Tax Practice Group.

Sylvia Gallagher is an Assistant Commissioner with responsibility for the Lodge and Pay Assist branch in Service Delivery. The Assist team is the first point of call when your clients have a debt to the ATO and we focus on helping clients to get back on track, through tailored interactions. Sylvia leads a number of debt call centre and processing teams, including outsource and External Collection Agency teams. Sylvia previously had responsibility for the ATO's relationship with the tax profession, including engagement, consultation, stewardship group and speaking events. Sylvia has led the Schools and Culturally and Linguistic Diverse Community education programmes, Tax Help and TaxTime support services. With over 20 years' experience in the ATO, Sylvia has specialist knowledge and skill in user centred design, strategy development, design facilitation, project management and policy and new measures design and development. Sylvia holds a Master's Degree in Business Administration.

Andrew Giorgi, FTI, is a tax and commercial lawyer with Smailes Krawitz. Andrew routinely acts in tax audits, investigations and disputes for a wide range of clients including individuals, private groups and companies. Supplementing his tax practice, Andrew also acts in commercial matters including advising on business acquisitions and disposals, drafting of commercial documents, estate planning and providing general commercial law advice. Andrew was awarded a Master of Taxation Law with Distinction from the University of Western Australia and has lectured at universities at an undergraduate and postgraduate level in taxation and trusts law.

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She has more than three decades in the profession, including a public practice background that preceded her various training roles over 23 years. A regular conference and webinar presenter, Robyn is also an avid advocate, social media commentator, columnist and blogger, and hosts The Tax Institute's

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TaxVibe podcast. She is frequently quoted in the media. Robyn is a Chartered Tax Adviser of The Tax Institute, a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. She regularly consults with the Treasury, ATO and professional associations on technical issues including as Co-Chair of the ATO's Tax Practitioner Stewardship Group and a member of various other working groups. Robyn has been recognised as a Thought Leader five times over four consecutive years (2019–2022) as Winner of this category across the Women In Finance Awards and the Australian Accounting Awards. Robyn was the Winner of the Accountants Daily Excellence Award 2020 and was named in the global Top 50 Women in Accounting 2019.

Alan Krawitz, CTA, is a Director of Smailes Krawitz, a boutique law firm that specialises in tax advice, tax disputes, wills and estates, trusts and commercial law on behalf of privately owned enterprises, high net worth individuals and family offices. In the 2023 edition of Doyle's Guide for Western Australia, the firm was ranked as a First-Tier firm in the category of "Leading Tax Law Firms" and was ranked equal second in the category "Leading Wills, Estates & Succession Planning Law Firms". Alan provides complex tax advice for private and family groups and high net worth individuals. He acts for taxpayers in disputes with the Australian Taxation Office, including matters filed in the Federal Court of Australia and the Administrative Appeals Tribunal. Alan provides estate plans of highly prominent individuals in Australian corporate life and acts for clients in relation to disputes involving trusts and estates.

Travis Kukura is a Principal in the Restructuring and Recovery team in the Perth office of RSM Australia. He is a Registered Liquidator with 25 years' experience in the corporate and personal insolvency industry. Travis has provided extensive advice to directors, corporations and individuals facing financial hardship, advising them on the options available and coming up with a plan to deal with the issues at hand. Travis has worked on numerous formal and informal insolvency appointments and has significant experience in all industries but has had specific exposure to industry sectors including transport, child care, telecommunications, construction and property development.

Chris McMahon is the Commissioner of State Revenue and is responsible for the daily operations of RevenueWA and for the performance of a range of statutory functions under the revenue laws the Commissioner administers. Chris has worked in revenue and grant administration since 1995 and is passionate about helping customers understand the law and in delivering accountable and transparent outcomes for customers.

David Montani, CTA, is Nexia Australia's National Tax Director, providing tax technical, strategic and training support to Nexia's team across Australia. He is an engaging speaker and is able to deliver technical tax information in an understandable and commercial format. Prior to commencing this role in 2019, David had 26 years of experience in taxation and business advisory.

Gina Nedeljkovic is the WA leader for RSM's Global Employer Services division. Gina's specialty areas include wage compliance, employment tax matters (Fringe Benefits Tax, Superannuation, PAYG Withholding, Payroll Tax), and global mobility/expatriate tax compliance and advisory services. Gina works with employers of all sizes to ensure they are meeting their wage and employment tax obligations. She assists clients to minimise future penalties and reputational risks. Gina is passionate about helping medium and large businesses create efficiencies by automating repetitive compliance tasks, along with identifying risk exposures using data analytics. Gina has spent the majority of her professional journey working at 'Big 4' firms, before joining RSM in 2023.

Shannon O'Connor is a Senior Manager within the Restructuring and Recovery team in the Perth office of RSM Australia. Shannon brings with her a wealth of experience, having worked within the insolvency industry for over 12 years. Shannon adeptly navigates complex financial situations, identifying and recovering assets and claims to achieve favourable outcomes for stakeholders. Shannon specialises in personal insolvency and is motivated by the opportunity to work with individuals, families, and their businesses during times of financial hardship and dispute to help them understand their financial circumstances, the options available to them, and the impact of these options.

Andrew Orme is the Deputy Commissioner for Objections and Review, the area that conducts independent reviews and decides objections to ATO decisions. Objections and Review contributes to trust and confidence in the tax system by objectively reviewing tax and superannuation decisions to deliver the right outcomes under the law. Andrew believes that impartiality, integrity and professionalism are essential in achieving an effective review system, and that the quality of communication has an important role to play in dispute resolution. Prior to taking up this role, Andrew was the Deputy Chief Tax Counsel heading up the ATO's Public Advice and Guidance programme. Andrew started

Presenters

his tax career at Clayton Utz and prior to joining the ATO he also worked as a policy analyst at Treasury.

Jemma Sanderson, CTA, is a Director of Cooper Partners Financial Services, heading up their SMSF specialist services. Jemma provides strategic advice on SMSFs, estate planning and wealth management to clients, as well as technical support and consultancy accounting, legal and financial planning groups. Jemma has over 20 years' experience in developing complex strategies for high net worth clients. Jemma is a regular presenter on superannuation and SMSFs for the professional bodies across the country, and is the author of The Tax Institute's popular publication for SMSF Advisers, the SMSF Guide, in its ninth edition. Jemma was named the SMSF Adviser of the Year at the 2019 National Women in Finance awards for the third year in a row and received the SMSF Association Chairman's Award in February 2018 for her contribution to the industry.

Daniel Taborsky, CTA, is the managing director and founder of Birchstone Legal Group. He is a tax specialist and has been recognised as a leading tax lawyer by Doyle's Guide since 2020.
He specialises in resolving tax disputes for high net worth individuals and private groups. Daniel advises on complex tax matters (with a particular interest in Division 7A), asset protection and estate/succession planning strategies and philanthropic ventures. Daniel works closely with family lawyers in complex financial matters. Daniel also advises not-for-profit entities, including charities, on structuring and tax issues. Daniel regularly presents and writes articles on tax issues for leading professional bodies.

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.

Stuart Third, CTA, is an Associate at Downs Accounting and Fellow Chartered Accountant with over 30 years' experience in providing taxation advice and business services to clients in various industry sectors. He is currently and has previously been a director and company secretary of ASX listed companies.
Stuart is a facilitator for the Taxation and Financial Reporting Masterclass workshops of the Chartered Accountants Program as well as a content reviewer for the Program. He has completed a Master of Taxation through the University of NSW ATAX Program as well as the Graduate Diploma in Applied Corporate Governance with the Governance Institute of Australia. His experience in public practice has drawn on these qualifications to enable the provision of advice to clients from individuals through to public companies.

Clare Thompson SC, ATI, is a barrister practising at Francis Burt Chambers since 2004. Prior to that she spent 10 years with major firm Freehills. She practises in commercial litigation with a focus on taxation, banking, property and equity. In 2020, 2021, 2022 and 2023 she was named in Doyle's Guide's list of leading tax barristers in Western Australia. She holds a first-class Honours degree in Laws from the University of Tasmania, a Masters of Laws from Melbourne University, a Bachelor of Business from the University of South Australia and a Grad Dip in Management from Curtin University. She was appointed Senior Counsel in 2021.

Scott Treatt, CTA, CEO brings a wealth of experience in tax practice, tax administration, and leadership to the role of Chief Executive Officer of The Tax Institute. Scott's career as a Chartered Tax Advisor has spanned large and mid-tier professional firms and Government in technical and leadership roles. A dedicated member of The Tax Institute for over 20 years, Scott has contributed significantly to the knowledge of members and the betterment of Australia's taxation and superannuation system overall. Scott was previously the General Manager, Tax Policy and Advocacy, at The Tax Institute, leading its tax technical team for three years. During this time, he proactively enhanced the team's capabilities, orchestrated a successful overhaul of the various committees and councils to improve the representation of our members, built strong relationships with key stakeholders across the industry, academia, and all levels of Government, and drove the Institute's growing influence in policy and advocacy circles. He is a passionate advocate for holistic tax policy reform and is a visionary business leader known for his forward-thinking approach. A commitment to strategic cross-team collaboration, good governance, a strong dedication to member empowerment and development, and an unwavering pursuit of excellence in every aspect of the business characterises Scott's leadership style. Under Scott's guidance, The Tax Institute is poised to provide employees and members with clear guidance, adeptly turning challenges into opportunities and catalysing sustainable growth.

Venue and accommodation

Hyatt Regency Perth

99 Adelaide Terrace, Perth, WA

Located on the foreshore parklands of the picturesque Swan River, Hyatt Regency Perth offers the quintessential location for any event. Savour unparalleled views coupled with a legacy of exemplary Hyatt service.

Getting there

This hotel is situated in the east end of Perth CBD, with multiple free CBD bus routes going past. Check out the TransPerth website for the best route. The Hyatt Regency Hotel is approximately 12km and a 20 to 30-minute drive away from Perth airport. Delegates can take advantage of a plethora of travel options, including bus, train, taxi or private car.

Parking

Enjoy the convenience of the driveway off Adelaide Terrace, which leads to valet parking. Alternatively, continue driving into our underground car parking facilities directly below our hotel for self parking. On-site self parking is available from $30 per day & valet parking is available for $50 per day. This is subject to change.

Accommodation

Hyatt Regency Perth is pleased to offer accommodation at a special delegate rate*. To book, call the reservations team on 13 12 34 or visit their website and select your stay dates, here.

*Rates subject to change based on availability at time of booking.

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

Attendance at the conference counts for 12 hours of Continuing Professional Development with The Tax Institute.

The Tax Institute's 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.

Welcome reception

A networking function will be held directly following the last session on Thursday from 5.30pm at the Hyatt Regency Perth. The networking function is included in the conference registration fee for delegates. 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.

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/ conference lunches	Conference welcome reception and networking*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Employer registration This registration option allows one registration to be shared between multiple attendees from the same firm.	✓		

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

Register now!

Register online ▶

Register via form ▶
included in this brochure

Discounts

Early bird registration

All registrations received and paid on or before Friday 9 February 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.

The Tax Institute

WA Tax Forum
Registration form

43718 | WD

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 16 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 9 February 2024	☐ $1,600	☐ $1,970	☐ $1,900
Standard registration Register after Friday, 9 February 2024	☐ $1,800	☐ $2,170	☐ $2,100

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

Welcome reception

The welcome reception is INCLUDED in the registration fee for delegates attending the full conference.

Thursday, 7 March at Hyatt Regency Perth

☐ Yes, I WILL be attending the Welcome reception OR

☐ No, I WILL NOT be attending the Welcome reception

☐ Yes, I require additional tickets for the Welcome reception at $80 per person

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

Dietary requirements:

______

***Become a member and save!**

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

- up to **50% off membership** for the first 12 months
- member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at taxinstitute.com.au/membership

JOIN TODAY

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: DD/MM/YYYY

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: DD/MM/YYYY

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

3 Breakout session options

Please tick the breakout sessions you would like to attend during the conference:

Thursday, 7 March 2024

9:45–10:45am
☐ Session 2A: Superannuation update
☐ Session 2B: Navigating the digital afterlife

2:00–3:00pm
☐ Session 5A: Handling a tax dispute from audit to litigation
☐ Session 5B: Employee obligations

24-010EVT_11/23

4 Payment summary

Registration fees	$
Additional guest tickets – Welcome reception ($80) each	$
Total payable	$

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

5 Payment method

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

☐ **Cheque payable to The Tax Institute** (in Australian dollars)

☐ **Credit card** Card type: ☐ AMEX ☐ Visa ☐ MasterCard ☐ Diners

Name on card:

Card no.: Expiry date: MM/YY

Cardholder's signature:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

For event enquiries, please contact the National Events Team on **1300 829 338** or nationalevents@taxinstitute.com.au

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

To register **Email** customeradmin@taxinstitute.com.au **Mail** L37, 100 Miller Street North Sydney NSW 2060 **Online** taxinstitute.com.au

The Tax Institute

Employer Ticket Registration Form

43718 | WD

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 Employer Ticket types

Employer tickets offer a flexible option for employers to send multiple attendees to an event.
We have different options to suit you and your team.

	Classic	Plus	Premium	Tailored
Early bird on or before 9 February	$3,250	$4,750	$6,250	
Standard after 9 February	$3,450	$4,950	$6,450	
Best for	SME	Mid-Tier	Corporate	Large/National
Flexibility	Your choice of 20 sessions	Your choice of 40 sessions	Your choice of 60 sessions	Contact us to tailor a quote today for you and your team to attend multiple events.
Team attendance	Up to 5 attendees	Up to 10 attendees	Up to 15 attendees	
Session formats	Face-to-face	Face-to-face	Face-to-face	
Networking	2 networking passes	5 networking passes	10 networking passes	

All Employer Ticket attendees receive:
- Electronic access to download available technical papers and presentations
- Morning tea, lunch and afternoon refreshments
- CPD hours allocated according to attendee

Session selection
- Coordinators will be contacted with a session selection form to complete on behalf of attendees, based on the Employer Ticket type selected.
- The session selection form must be completed in full to ensure proper allocation of CPD hours post-event.

1 Employer Ticket types

Promotional code:

Ticket type	Cost	No. of tickets	Sub-total
		Total payable $	

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: DD/MM/YYYY

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

3 Payment method

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

☐ **Cheque payable to The Tax Institute** (in Australian dollars)

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Name on card:

Card no.: Expiry date: MM/YY

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To register **Email** customeradmin@taxinstitute.com.au **Mail** L37, 100 Miller Street North Sydney NSW 2060 **Online** taxinstitute.com.au

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The Tax Institute

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