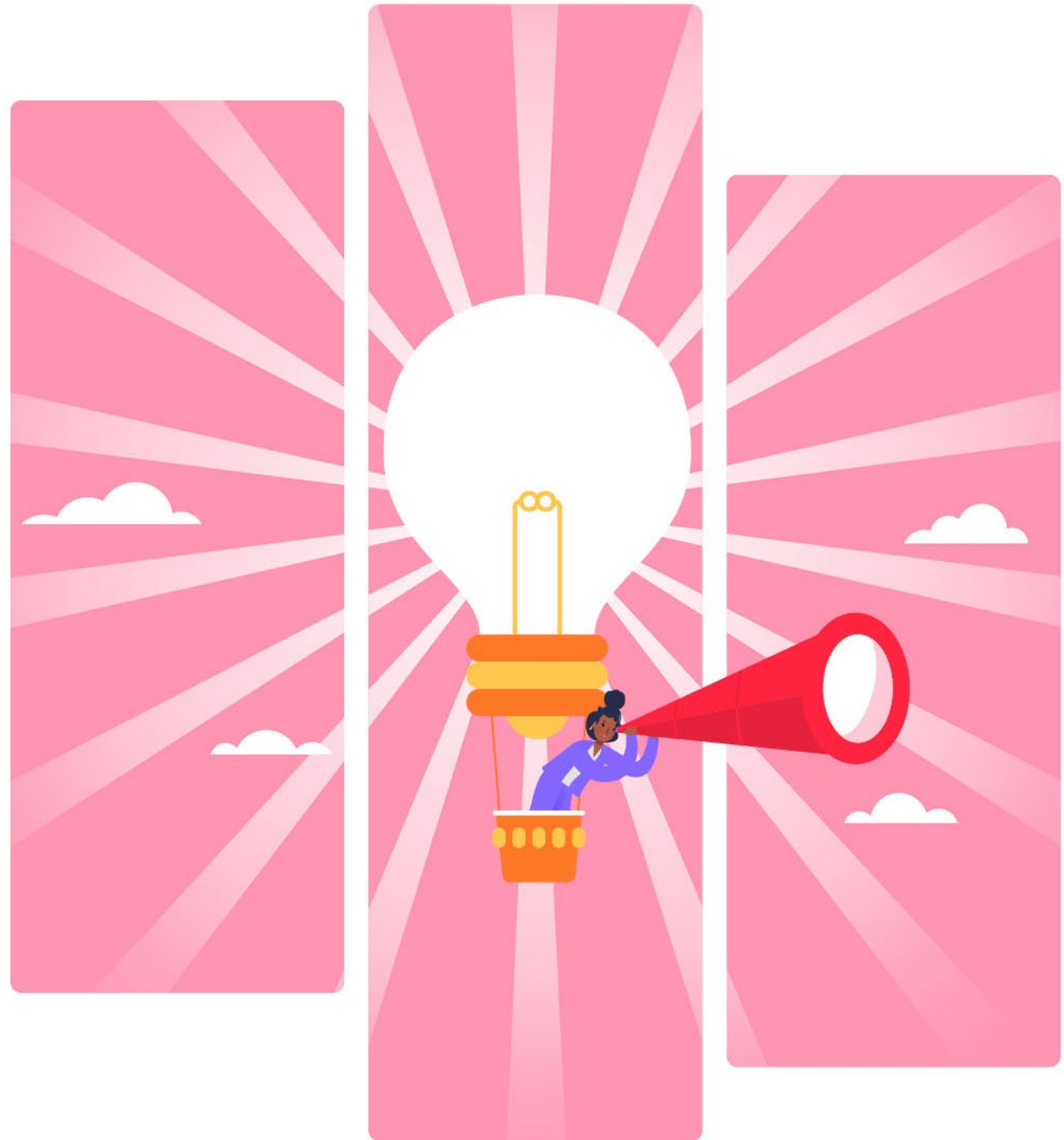


# Yarra Valley Tax Retreat

18–19 July 2024

RACV Healesville Country Club & Resort

12 CPD hours



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

Rachel O'Donnell, CTA, O'Donnell Tax Law, Chair, Organising Committee

Daniel Angelovich, Mazars

Megan Bishop, Holding Redlich

Neil Brydges, CTA, Sladen Legal

Mark Gioskos, FTI, Victorian Bar

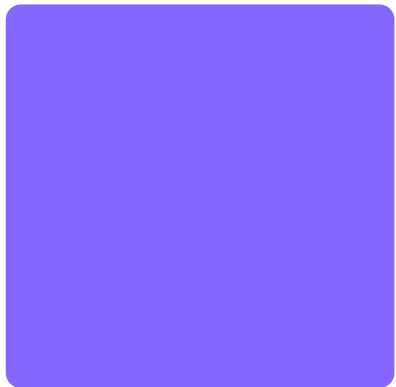
Karen Goodfellow CTA, Goodfellow Tax Advisory

Gary Thomas, CTA, Gary Thomas Chartered Accountants

Bradley White, Hall & Wilcox Lawyers

Georgia Whiteside, Johnson Winter Slattery

Adrian Zuccarini, Australian Taxation Office



# Welcome

Whether you prefer bright ruby with a purple hue or an aroma of cherries and summer berries with hints of spice and oak, our Retreat Organising Committee welcomes you to “read between the vines” at this year’s Yarra Valley Tax Retreat.

Located in the gorgeous Yarra Valley wine region at the RACV Healesville Country Club & Resort, our packed program offers tax sessions for every palate (including those that prefer their grape juice unfermented). We have excellent presenters lined up to share their knowledge during our valuable technical sessions, with practical insights aimed at applying our tax laws to real-life situations. Our interactive workshops (the tax equivalent of stomping on the grapes) will then aid the fermentation process and bring it all together to produce a flavour profile that will leave delegates feeling like the sommeliers of the tax world!

This year’s terrific technical program starts with a sparkling session, kicking off with a Pandora’s box of trust issues, and finishing with some sticky and sweet tax issues (much like a dessert wine) shared in a format that’s a refreshing take on a workshop. During the retreat we’ll also swirl a deep red to discuss “whether super is still super”, sip the fresh, citrusy aromas of the “GST unknown unknowns”, and ripple our palates on the ever-present issues associated with professional practices and payroll tax.

Our palate cleansers between glasses (ie our workshops between our plenary sessions) will build on the content covered during the technical sessions, providing delegates an opportunity to share the “tasting notes” they’ve picked up along the way, and apply them to practical case studies.

We also look forward to networking, relaxing, unwinding, and waxing lyrical on the splendours of the Yarra Valley at our retreat dinner!

The 2024 Yarra Valley Tax Retreat Organising Committee looks forward to seeing you in July.



A handwritten signature in black ink, appearing to read 'Rachel O'Donnell'.

**Rachel O'Donnell, CTA**  
Chair, Retreat Organising Committee

**Early bird pricing offer**  
**Register on or before 21 June 2024 to save!**

# Technical program

**Day 1** Thursday, 18 July 2024

Time AEST	Session
9:00 – 9:30am	Registration and light morning tea
9:30 – 10:00am	Welcome and opening address Speakers: Rachel O'Donnell, CTA, Chair, Retreat Organising Committee, Todd Want, CTA, President, The Tax Institute
10:00 – 11:00am	<b>Session 1: A Pandora's box of trust issues</b> Speaker: Kaitilin Lowdon, ATI, Sladen Legal  Assisting trustee clients with compliance and other obligations in your practice is an exercise full of traps for the unwary. This session explores a number of issues that need to be considered by advisers, including: <ul style="list-style-type: none"><li>• Making sure your clients understand the terms and conditions in a trust instrument</li><li>• What to do if you can't locate the trust deed</li><li>• Who can benefit from the trust; have you considered whether a possible object is really a beneficiary</li><li>• Ensuring trustee decisions are made on time</li><li>• What happens if the 'vesting day' has already passed</li><li>• Looking to deed amendments; when you can and when you might need to approach the Courts</li><li>• Assessing the tax traps, including s99B (and 99C), 100A, etc</li><li>• The impact of the AATA '<i>Bendel</i>' decision; do sub trusts really exist?; and</li><li>• The impact of the '<i>Owies</i>' decision – how that might impact trustee decisions.</li></ul>
11:00am – 12:00pm	<b>Session 2: Tangled vines that multiply – Windfall Gains Tax, Commercial and Industrial Property Tax, and other important Victorian state tax changes</b> Speaker: Kristina Popova, Grant Thornton  Viticulture is a little bit like state taxes. There is so much to know and understand, a small difference in the inputs / facts or processes / steps can produce a vastly different outcome, and even the most experienced viticulturist or tax advisor needs to keep up with changes and remain current. Victoria has seen significant state tax changes in recent times, with the introduction of new taxes, amendments to existing laws, and rate changes that have increased the number of taxpayers and the impact of particular taxes upon taxpayers. In this session, Kristina will focus primarily on Victoria and discuss: <ul style="list-style-type: none"><li>• The windfall gains tax (WGT), which will have been in operation for just over a year</li><li>• The proposed new commercial and industrial property tax (CIPT), which is currently scheduled to commence from 1 July 2024;</li><li>• Other recent occurrences in the world of duties and land tax that practitioners should know about.</li></ul>

# Technical program

**Day 1** Thursday, 18 July 2024 continued

Time AEST	Session
12:00-1:00pm	Lunch
1:00-2:00pm	<p><b>Session 3: Professional Practices and Payroll Tax</b> Speaker: Anthony Bradica, CTA, Hall &amp; Wilcox Lawyers</p> <p>With revenue authorities, nation-wide, casting a spotlight on professional services, particularly medical practices and their liability for payroll tax, it is now more important than ever for practice managers, business owners and their advisers to understand the extent of their tax responsibilities with respect to both their employees and their contractors.</p> <p>In this session we will examine:</p> <ul style="list-style-type: none"><li>• The current state of play with respect to the application of payroll tax in the professional service context across each State/Territory, including the exemptions that can often apply</li><li>• The payroll tax grouping provisions and how to spot a potential issue</li><li>• The current key cases relevant to determining if an employee is an employee or contractor under common law; and</li><li>• Why superannuation is becoming more important for professional practices, common mistakes that we see and how to avoid them.</li></ul>



# Technical program

**Day 1** Thursday, 18 July 2024 continued

Time AEST	Session
2:00–3:30pm	<p><b>Workshop 1: Pinot noir – The blended session</b></p> <p>Workshop Leader: Rachel O’Donnell, CTA, O’Donnell Tax Law</p> <p>Workshop Facilitators: Anthony Bradica, CTA, Hall &amp; Wilcox Lawyers, Mark Gioskos, FTI, Victorian Bar, Kaitilin Lowdon, ATI, Sladen Legal</p> <p>Many of the pinot noirs from the Yarra Valley blend grapes sourced from various vineyards. This workshop will consider a case study based on a blend of the topics addressed in our first three plenary sessions, including the following issues:</p> <ul style="list-style-type: none"><li>• Proposed amendments to trust deeds – whether (and, if so, how) they can be made</li><li>• Identifying the objects / beneficiaries of a particular trust</li><li>• Making decisions as a trustee – a “choose your own adventure” scenario where we get to make the decisions and find out what impacts they can have</li><li>• Identifying whether CIPT will be payable. If so, how and when? Is the client eligible for a transitional loan?</li><li>• Payroll tax grouping – Do we need to make a disclosure? Will the Commissioner of State Revenue exercise his discretion to “degrouper”?; and</li><li>• Identifying whether an individual is an employee or contractor, and whether payroll tax is payable.</li></ul>
3:30–4:00pm	<b>Afternoon tea</b>
4:00–5:00pm	<p><b>Session 4: Trusts and small business CGT concessions – Oil and water or peas and carrots?</b></p> <p>Speakers: Neil Brydges, CTA, Sladen Legal, Karen Goodfellow, CTA, Goodfellow Tax Advisory</p> <p>Oil and water don’t mix, while Forrest Gump said, “Jenny and me was like peas and carrots”.</p> <p>Trusts have unique tax features that are attracting ever increasing scrutiny from the ATO. Therefore, when it comes to the tax flexibility that a trust may give to the small business CGT concessions, it is imperative that the use of the concessions stands up to scrutiny.</p> <p>This session explores issues applicable to a trust’s use of the concessions and whether the interaction is like oil and water, peas and carrots, or both. Topics covered will include:</p> <ul style="list-style-type: none"><li>• The complex requirements when selling interests in trusts</li><li>• Determining connected entities and affiliates</li><li>• Determining if a trust has a CGT concession stakeholder and calculating the direct and indirect small business participation interest</li><li>• Applying the small business 15-year exemption and small business retirement exemption to trusts; and</li><li>• Corporate beneficiaries receiving trust distributions that include the small business 50% active asset reduction.</li></ul>

# Technical program

**Day 1** Thursday, 18 July 2024 continued

Time AEST	Session
5:00 – 6:00pm	<p><b>Session 5: Navigating professional standards in a renewed landscape</b></p> <p>Panellists: Dr Julianne Jaques KC, CTA, Victorian Bar, Leanne Connor, CTA, WGC Advisory Chris Wallis, CTA, Victorian Bar Facilitator: Robyn Jacobson, CTA, The Tax Institute</p> <p>Tax advisers play an essential role in the tax system and in influencing the tax performance of their clients. Wide-sweeping reforms to the <i>Tax Agent Services Act 2009</i> (TASA) to strengthen the regulation of the tax profession have changed the narrative of how agents engage with each other and their clients. It is crucial practitioners understand their new obligations under the <i>Code of Professional Conduct</i> (Code) in the TASA and the enhanced regulators' powers.</p> <p>In this session, our panellists will discuss and help you navigate through some of these important reforms, including:</p> <ul style="list-style-type: none"><li>• What has changed?</li><li>• Engaging disqualified entities</li><li>• When are you required to self-report significant breaches of the Code?</li><li>• When are you required to 'dob in' another agent for significant breaches of the Code?</li><li>• What constitutes a 'significant breach'?</li><li>• When do you have to disclose your own 'laundry' to your clients?; and</li><li>• How will this look when the dust settles on the new regime?</li></ul>
6:00 – 7:00pm	<b>Delegate free time</b>
7:00 – 10:00pm	<b>Yarra Valley showcase and retreat dinner</b>



## Yarra Valley showcase and retreat dinner

Showcasing the best of the Yarra Valley, join your colleagues, peers and our esteemed presenters for an evening of networking. Keep toasty by the fire, enjoy divine wine and delicious food from Victoria's premier wine region.

**Date:** Thursday, 18 July 2024

**Time:** 7:00–10:00pm

**Venue:** RACV Healesville Country Club & Resort

**Price:** Inclusive for all full registration delegates  
\$150 for additional tickets – see registration form for details

**Dress:** Business or Business casual



# Technical program

**Day 2** Friday, 19, July 2024

Time AEST	Session
8:30 – 9:30am	<p><b>Session 6: GST update – The GST unknown unknowns!</b> Speaker: Kati Pedersen, PwC</p> <p>Are you across the GST issues that can arise for your clients? Many taxpayers and advisors alike can be caught out when it comes to GST. They know the basics but they're less aware of some of the quirks and nuances that can present themselves in practice, particularly in the complex GST areas of property and product classification. Did you hear about the case where the judge sampled some yoghurt and held that it was taxable? When is a property not treated as a property?... when it is treated as four properties! This session will provide an overview of the entertaining judgments handed down in these recent cases and more.</p> <p>This paper will primarily focus on GST issues related to property, deposits (which can also be relevant for non-property transactions) and food classification, however we will also include a flavour of the Wine Equalisation Tax (given we're meeting in the lovely Yarra Valley, which is known for its vines and wines).</p>
9:30 – 10:00am	<b>Morning tea</b>
10:00 – 11:30am	<p><b>Workshop 2: Chardonnay – How well do we really know this old favourite?</b> Workshop Leader: Georgia Whiteside, Johnson Winter Slattery Workshop Facilitators: Megan Bishop, Holding Redlich, Neil Brydges, CTA, Sladen Legal, Karen Goodfellow, CTA, Goodfellow Tax Advisory</p> <p>Chardonnay was on most wine lists (even the shorter ones) many years ago before it fell out of favour a bit. It's since had a resurgence of sorts but many bottles have quite a different flavour to the chardys of the past. The small business CGT concessions, professional standards, and GST have also been around for quite a long time now but some practitioners are still grappling whether the nuances of the CGT concessions, we have a renewed focus on the professional standards with increased scrutiny and obligations under the Code, and the recent GST cases have shown us that even the basic necessities (such as food) can require GST analysis that is far from basic! This workshop will entwine these topics into a case study to press out the best flavour.</p>
11:30am – 12:30pm	<p><b>Session 7: Taxing fame – How do we tax individuals that sometimes see the world through rosé-coloured glasses?</b> Speaker: Paul Hockridge, CTA, Hockridge Advisory</p> <p>Historically, individuals have been financially rewarded for their skills or services, or less commonly, their “public fame” or “image”. The new economy has seen the rise of not just celebrities but also of influencers. This raises a number of complex tax issues including:</p> <ul style="list-style-type: none"><li>• What are they paid for?</li><li>• How and when the ordinary income rules might apply</li><li>• How the non-cash business benefits rules might apply</li><li>• How the alienation of personal services income (PSI) rules might apply</li><li>• How the FBT rules might apply</li><li>• What happens when a double tax agreement applies?</li><li>• What happens when more than one set of taxing rules applies?</li><li>• The alienation of fame or image rights to related entities; and</li><li>• Recent developments.</li></ul>



# Technical program

## Day 2 Friday, 19, July 2024 continued

Time AEST	Session
12:30-1:30pm	Lunch
1:30-2:30pm	<p><b>Session 8: Is super still super?</b> Speakers: Daniel Angelovich, Mazars, Daniel Butler, CTA, DBA Lawyers</p> <p>The taxation of super continues to be a hot topic and the subject of ongoing reforms from the current government. Recent changes have significantly restricted contributions, pensions and from 1 July 2025 a proposed new division 296 tax of up to 15% on total superannuation balances above \$3 million; including on unrealised gains. So, with all these changes, is super still as 'super' and efficient for the future? Also, we examine alternate structures that can be considered for family wealth and succession.</p> <p>This session will cover the following key areas:</p> <ul style="list-style-type: none"><li>• Review where we are at with pensions and determining whether to commence a TRIS or account-based pension</li><li>• Cover key recent tax changes to super including div 296, NALI/E and other changes</li><li>• Review the main alternative structures that are available; and</li><li>• Work through a number of case studies and provide practical tips and strategies.</li></ul>
2:30-3:30pm	<p><b>Workshop 3: The tasting tour – Sip, hold, swirl, and breathe in a little!</b> Workshop Leader: Rachel O'Donnell, CTA, O'Donnell Tax Law Workshop Facilitator: Frank Hinoporos, CTA, Hall &amp; Wilcox Lawyers</p> <p>This will be a workshop with a difference!</p> <p>With pairings especially curated for our delegates, we will match questions with answers that are as perfectly suited as a well-designed degustation menu. At the end of our packed technical programme, this session will bring it all together as delegates fortify our knowledge from each of the plenary sessions throughout the retreat. As we label the bottles, pack them in their cases for distribution, and being planning next year's vines (do we need to remove weeds, plant new rootstock, or switch up our varieties?), we'll light-heartedly wrap up all that knowledge and raise a toast to our beloved Yarra Valley Tax Retreat.</p>
4:00pm	Closing address and networking drinks

# Presenters

**Daniel Angelovich** is a Senior Manager in the Tax Consulting Team of Mazars Melbourne. Daniel graduated from Deakin University with a Bachelor of Commerce (with distinction) and Law and completed a Masters in Taxation at the University of Melbourne. He is a Chartered Accountant. As a Senior Manager in the Mazars Tax Consulting Team, Daniel assists clients with navigating through the complexities of the Australian taxation system both from a domestic and global perspective, with a focus on achieving their overall goals and objectives.

**Megan Bishop** is Special Counsel in the Holding Redlich Tax Risk, Dispute Resolution and Litigation Team. She is a qualified legal practitioner and an accredited mediator. She assists a wide range of clients in their interactions with the revenue authorities including in various ADR forums, VCAT, AAT, Federal Court and High Court appeals across a broad spectrum of tax issues, including most recently R&D disputes with AusIndustry and the ATO, transfer pricing, tax treaties, Part IVA and corporate and individual tax residency.

**Anthony Bradica, CTA**, is a Partner with Hall & Wilcox. Anthony is a highly regarded tax practitioner with extensive experience in commercial transactions, deals and arrangements. Anthony has extensive tax advisory

expertise in matters relating to income tax, employment taxation, and tax controversy involving Federal and state taxation authorities. In particular, Anthony specialises in providing tax structuring and due diligence advice, and legal drafting for acquisitions, divestments and business restructures. Anthony has broad industry experience with a focus on mid-cap corporate groups, SMEs and start-up companies and is a published author and regular presenter on income tax law.

**Neil Brydges, CTA**, is a Principal Lawyer in Sladen Legal's Tax group. Neil practises in all areas of direct and indirect tax, with a particular focus on the taxation of trusts, property, corporate tax, M&A and Div 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 Dispute Resolution Technical Committee with The Tax Institute.

**Daniel Butler, CTA**, is recognised as one of Australia's leading SMSF lawyers complemented by his taxation and commercial expertise. He has worked predominantly in the fields of tax and superannuation over the past 36 years,

is a qualified Chartered Tax Adviser, Chartered Accountant and has an MBA from the University of Melbourne. Dan is a regular seminar presenter on tax and SMSF topics and has published extensively in these areas. Dan regularly presents for the major professional bodies including the SMSF Association, The Tax Institute, Chartered Accountants Australia and New Zealand and DBA Network. Dan is a member of the ATO's Super & Employment Change Committee, The Tax Institute's National Superannuation Committee, the Law Institute of Victoria's Tax Committee and is involved with a number of other tax and SMSF committees. Dan presents on the subject of Taxation of Superannuation at the University of Melbourne's Master of Laws/Tax program. Dan is also a Specialist SMSF Advisor.

**Leanne Connor, CTA**, is a Director of WGC Business Advisors, a chartered accountancy firm specialising in taxation and strategic advice to SMEs and high net worth individuals. Leanne has over 30 years experience providing accounting, business advisory, strategic superannuation and taxation services. Leanne's areas of expertise include tax and superannuation planning, business restructuring and understanding the fundamental issues relating to SMSFs, family trusts and private companies.

Leanne is a Director and National Council member of The Tax Institute and past chair of its Victorian State Council & PD Committee. She is a regular presenter for The Tax Institute and winner of the 2020 SME Tax Adviser of the Year Award.

**Mark Gioskos, FTI**, is a Barrister at the Victorian Bar, and specialises in all aspects of taxation and revenue law. He also practises in commercial law, public and administrative law, and equity and trusts. Mark comes to the Bar with a decade of experience practising as a solicitor, most recently as a special counsel at Thomson Geer. During that time, he advised in a variety of taxation and commercial disputes, representing government agencies, listed and multinational groups, small and medium sized enterprises, high net worth families and not-for-profit organisations. Mark is experienced in every stage of engagement with revenue authorities, from review and audit through to tribunal and court proceedings. He serves as a member of the Tax Bar Association committee and is also a member of The Tax Institute's Victorian State Council. Mark holds a Master of Laws from the University of Melbourne and is a Fellow of The Tax Institute. He has lectured on various topics for The Tax Institute's Chartered Tax Adviser course. Mark has written several articles published in

# Presenters

professional journals and is a regular presenter at conferences and seminars. He was named as a winner of the Australasian Lawyer 2022 Rising Star awards.

**Karen Goodfellow, CTA**, is the owner and principal of Goodfellow Tax Advisory Pty Ltd, providing specialist tax consulting services and training to accountants, lawyers and other advisors to SMEs and family groups. She is an experienced tax professional with extensive experience in the tax advising and education (CPD/CPE) space. As the founder and operator of two successful tax training businesses Karen has detailed knowledge of Australia's federal tax system. Karen's extensive experience providing tax advice and training gives her an excellent understanding of the most pressing issues facing tax practitioners such as CGT roll-overs, the Small business CGT concessions, the CGT main residence exemption, taxation of trusts and taxation of companies.

**Frank Hinoporos, CTA**, is a Partner in the Tax group at Hall & Wilcox. Frank has a particular focus on domestic and international tax for individuals and private groups, including the complex issues tax issues arising from international succession planning. His clients include SMEs, high net worth individuals and families and not-for-

profit entities. Frank is a member of the Law Institute of Victoria, a Chartered Tax Adviser with The Tax Institute, a Fellow of the Governance Institute of Australia and a member of the Society of Trust and Estate Practitioners (STEP).

**Paul Hockridge, CTA**, is the Principal of Hockridge Advisory. He has worked for the ATO, a large law firm, has been a partner in medium and Big 4 chartered accounting firms and has over 30 years' experience in tax, asset protection, estate and succession planning. Paul's niches include litigation support, property development and FBT and salary packaging. Paul specialises in advising high wealth families and closely held businesses, as well as providing support for a number of accounting and law firms. Paul maintains a practicing certificate as a legal practitioner in Victoria, is a fellow of Chartered Accountants Australian and New Zealand, is senior fellow and teaches in the Masters program in the Law School at the University of Melbourne and is a chartered tax adviser. He sits on The Tax Institute's FBT and Employment Taxes Committee and for several years contributed to The Tax Institute's book, Estate and Business Succession Planning. Perhaps Paul is best known as a regular presenter at local, State and National Tax Institute conferences.

**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 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.

**Dr Julianne Jaques KC, CTA**, is a barrister specialising in taxation law who has appeared in all higher Federal, Victorian and New South Wales including the High Court in Bywater

and Sharpcan. She is a member of the Federal Government's Board of Taxation (reappointed 8 December 2023) and the Independent Parliamentary Expenses Authority (reappointed 1 July 2022), and a former member of the Tax Practitioners Board (2016–2022). In March 2020, Julianne was awarded Chartered Tax Adviser of the Year by The Tax Institute from an eligible membership of over 7,000 across Australia.

**Kaitilin Lowdon, ATI**, is a special counsel in Sladen Legal's tax group. Kaitilin practices in all areas of federal taxes, with a particular focus on the taxation of trusts, corporate trust, Division 7A, distributions from foreign entities and residency matters. Kaitilin's clients include (ultra) high-net wealth individuals, family groups and business enterprises. Her strategic acumen and technical prowess allow her to offer commercially driven advice that empowers clients to make informed decisions, working with them to obtain commercial and practical outcomes. She possesses a wealth of experience across all stages of ATO reviews and audits, from initial information requests (both formal and informal) to negotiating settlements, objections, and representing clients in Part IVC proceedings at all judicial levels.

# Presenters

**Rachel O'Donnell, CTA**, of O'Donnell Tax Law, specialises in GST, and duties, land tax and payroll tax across all Australian states and territories. Rachel has significant experience advising large listed and unlisted corporates, high net worth individuals and small to medium enterprises. With 20 years of experience advising on tax law, she has a broad range and depth of experiences and is very familiar with the operation and technicalities of the GST and various state and territory tax regimes, which are constantly evolving. Rachel's clients have included major international and national companies / trusts / groups in the property development, property funds management, infrastructure, superannuation, and retirement living / aged care industries, as well as high net wealth family groups.

**Kristina Popova** is a Partner in Grant Thornton's State Taxes practice. Kristina is experienced with advising clients operating across a diverse range of industries and specialises in stamp duty, land tax and various other state and territory imposts, including foreign owner surcharges, across all Australian jurisdictions. Kristina is admitted as a lawyer in the Victorian Supreme Court and has advised and acted on indirect tax disputes in the Supreme Court of

Victoria, the Federal Court of Australia, the Victoria Civil and Administrative Tribunal and the NSW Civil and Administrative Tribunal. Kristina is also a member of TTI's Victorian State Taxes Committee.

**Kati Pedersen** is a director in the PwC Indirect Tax team located in Melbourne, with over 18 years of experience in advising on the technical and commercial implications of Australian GST, as well as VAT in the United Kingdom and the European Union. Kati is experienced in advising large retailers, property developers, retirement village operators and private wealth groups across a full range of GST technical matters and ongoing management of GST obligations. Her experience includes advising on property transactions, business divestments and restructuring, cross border transactions and GST product classification matters, as well as assisting her clients with GST system and process reviews, GST compliance automation, Australian Taxation Office (the ATO) GST top 100/1000 justified trust reviews, and ATO engagement on complex GST matters such as audits, private rulings and objections. Kati holds a BSc in Management Sciences from the University of Warwick (the UK) and is a Chartered Tax Advisor (UK).

**Chris Wallis, CTA**, is a Barrister and has over 35 years years in practice dealing with many mundane matters but Chris' reputation has been made with satisfactory outcomes in the hard and difficult disputes that end up a practitioner's "too hard basket". Day to day Chris' work involves providing easily read and comprehensive advice in relation to trusts or real property; working with family lawyers to trace assets and identify tax exposures in a relationship breakdown; working with clients to resolve long and difficult disputes with revenue authorities and working with practitioners to ward off the TPB, often being called in only after the parties are at 'six paces'. Chris is a regularly published author and has delivered more than 150 presentations around Australia for the several professional bodies, the

Australasian Tax Teachers Association, the Television Education Network, the Tax Bar Association and the late Gordon Cooper's Problems in Practice.

**Georgia Whiteside**, is a Senior Associate at Johnson Winter & Slattery. She has experience in both tax disputes and tax advisory work. She has acted for multinational clients in large tax audits and disputes and, in 2018, she completed an associateship with Justice Steward in the Federal of Australia. On the advisory side, Georgia has experience advising on the tax implications of mergers and acquisitions and cross border transactions. She also has in-house experience, having completed a secondment to a multinational FMCG company. From 2021 to 2023, she practiced tax law with a Magic Circle firm in London.



# Venue and accommodation



## RACV Healesville Country Club & Resort

122 Healesville-Kinglake Rd, Healesville VIC 3777

The RACV Healesville Country Club & Resort provides a range of leisure, dining, accommodation and event options in the heart of Victoria's premier wine and fresh produce region, the Yarra Valley. Explore all the region has to offer, including wineries, galleries, wildlife, walking trails, adventure activities and local produce suppliers.

### Getting there

The resort is approximately a 90-minute drive from Melbourne Airport (Tullamarine) or Melbourne CBD. Car hire is readily available at Melbourne Airport and we encourage you to book when registering for the event.

### Parking

RACV Healesville Country Club & Resort has free parking available for retreat guests.

### Accommodation

RACV Healesville Country Club & Resort offers luxurious accommodation with stunning views of the resort. Accommodation is limited, book early to avoid disappointment.

A corporate rate has been negotiated with RACV Healesville Country Club & Resort. Please call 03 5962 4899 and quote "The Tax Institute" to secure your booking.

Planning to stay for the weekend? As accommodation is limited, we recommend you book your accommodation as soon as possible to avoid disappointment.

For more accommodation options, please click [here](#)

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.





# Stay and play in the world-famous Yarra Valley

The Yarra Valley is widely renowned as Victoria's premier wine region, however there is an extensive number of other unique experiences for you to enjoy too. From hot-air ballooning to cycling and wildlife spotting, there is something for everyone! Some highlights are below, but for more information head to [www.visityarravalley.com.au](http://www.visityarravalley.com.au) to plan your stay.

## Golf pros

RACV Healesville Country Club & Resort offers an 18-hole golf course. Surrounded by beautiful native trees and vegetation, the Michael Clayton designed 18-hole course offers members a unique playing experience.

Bookings are essential. To book please call 03 5969 9451 and quote "The Tax Institute". Green fees – 9 holes cost \$34pp, 18 holes \$40pp. There is also a Pro Shop team onsite who will be able to assist with equipment hire bookings.

## Spa fans

You deserve to pamper yourself! Book a relaxing massage or treatment at the onsite One Spa. Located at RACV Healesville Country Club & Resort, making it easier than ever to restore the mind and body before or after the conference. Bookings are essential. To book, please contact One Spa on 03 5969 9388.

## Thrill seekers

Soak up the fresh air in the picturesque Victorian countryside by completing one of the many walking or cycling trails. The ever-popular Lilydale-Warburton Rail Trail will provide wonderful views of the scenery, while those who would like more of a challenge could attempt to cycle to the Mt Donna Buang summit.

Experience the ultimate adrenaline rush and the region from above, with Hot Air Ballooning, plane rides and sky diving.

## History buffs

A must visit for all history buffs is Coombe Yarra Valley. Once the home of Dame Nellie Melba, the estate is a bustling seven acres of stunning gardens famous for its high teas and Devonshire tea. Learn about the life of Dame Nellie Melba and her ever important role in Australian history. Climb aboard Puffing Billy Railway, an iconic

attraction in the area. Weave through forests and over historical trestle bridges as you make stops in a variety of local towns along the way.

## Art enthusiasts

You'll find plenty of private galleries dotted across the region, highlights include Forging Ahead Metal Sculptures, TarraWarra Museum of Art, Monsalvat Art Centre and The Waterwheel Art Gallery at Warburton.

## Wildlife warriors

Take a short 10-minute drive to Healesville Sanctuary where you can wander through serene tracks and meet over 200 species of Australian animals. You will be in awe of the beauty, strength and power of the Australian wildlife. With daily shows including: Spirits of the Sky and Tales from Platypus Creek, this is an experience not to be missed.

## Snow lovers

Take a drive to one of Victoria's many pristine alpine mountains. You could be enjoying the snow in just under an hour at Mount Donna Buang or Lake Mountain.

Food, wine and drink connoisseurs With over 80 cellar doors, it's easy to eat and drink your way around the Yarra Valley. A variety of food and wine tours operate 7 days a week.

Home to the world's best gin, Four Pillars Gin is the first Australian distillery to be awarded International Gin Producer of the Year in 2019. Visit the iconic distillery in Healesville and immerse yourself in one of their distillery masterclasses. These classes sell out very early, bookings are essential.

A must attend is the Yarra Valley Chocolaterie, just out of Yarra Glen. Taste their delicious creations or attend a chocolate marking workshop.

Yarra Valley harvests some of the best produce, including berries, limes, lemons and kiwi fruit. Fresh is always best, with an abundance of U-Pick farms, there is always something delicious in season to pick. Operating every Saturday from 8.30am to 1pm in Healesville, the Yarra Valley Organic Farmers Market is a must to get the freshest organically grown produce at affordable prices.

For more information or ideas for your stay click [here](#).

# 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

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

## Delegate list

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

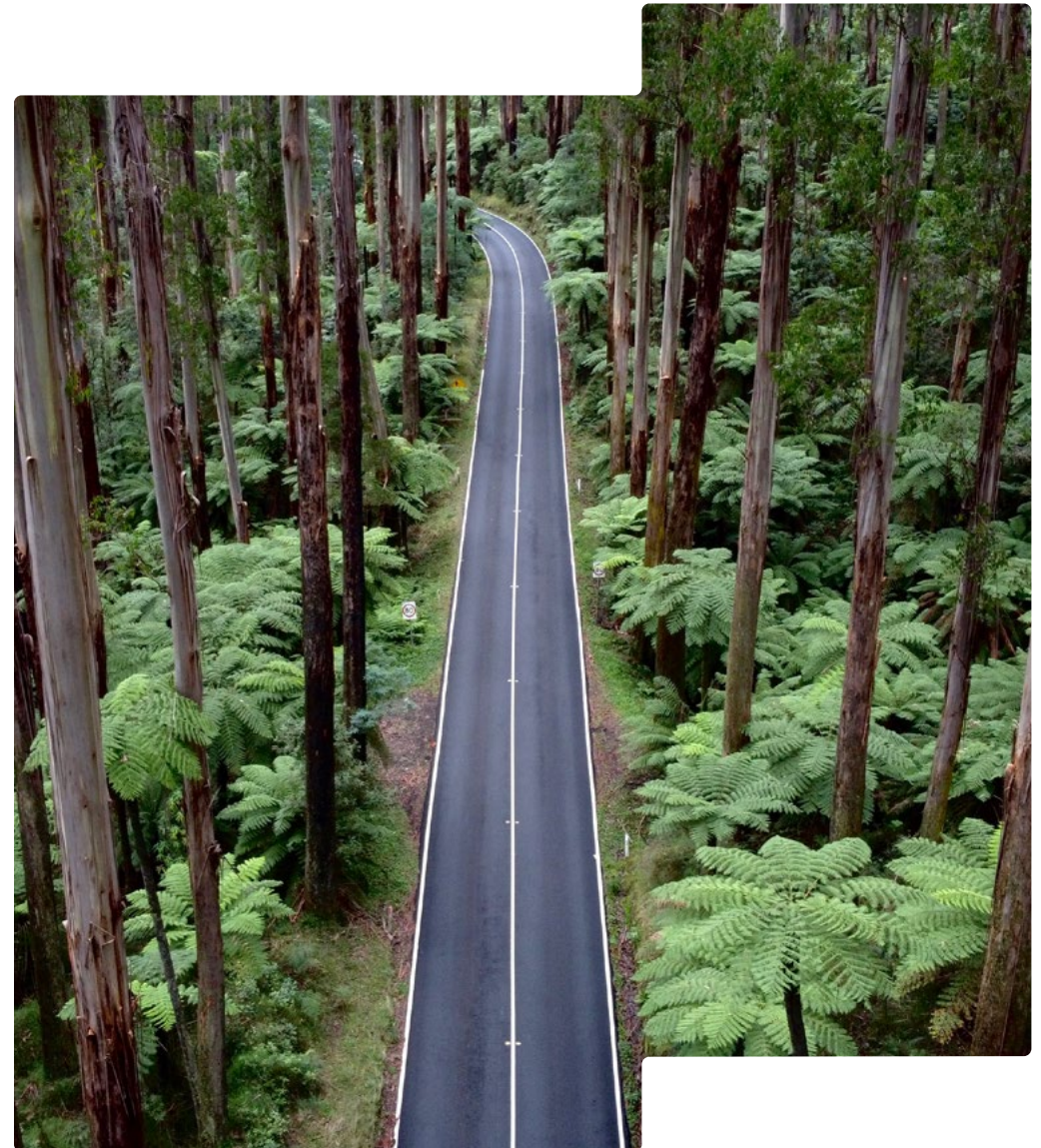
## Dress code

Business or business casual attire is suitable for the duration of the retreat.

## Networking functions

### Yarra Valley showcase and retreat dinner – RACV Healesville Country Club & Resort

Following a day of technical sessions, delegates are invited to unwind with the casual style retreat dinner featuring the finest fresh produce and wines from the Yarra Valley region. Participate in the pre-dinner Yarra Valley showcase where local food and drink providers will come to you exhibiting the best of the Yarra Valley. The Yarra Valley showcase and retreat dinner is included in the registration fee for full retreat delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$150.





# Registration

## Registration inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ retreat lunches	Yarra Valley Showcase, retreat dinner and closing drinks*
<b>Full registration</b> 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 21 June 2024 will be entitled to an early bird discount.

**Please note:** The registration fee does not include accommodation, hotel incidentals or transfers.

### Group discount

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](mailto: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 16 for registration inclusions.

### Full registration – 12 CPD hours

	Member	New member*	Non-member
<b>Early bird registration</b> Register on or before 21 June 2024	<input type="checkbox"/> \$1,400	<input type="checkbox"/> \$1,400	<input type="checkbox"/> \$1,700
<b>Standard registration</b> Register after 21 June 2024	<input type="checkbox"/> \$1,600	<input type="checkbox"/> \$1,600	<input type="checkbox"/> \$1,900

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 retreat.

### Yarra Valley showcase & retreat dinner | Thursday, 18 July 2024 at RACV Healesville Country Club & Resort

- Yes, I WILL be attending the Yarra Valley showcase & retreat dinner OR  
 No, I WILL NOT be attending the Yarra Valley showcase & retreat dinner  
 Yes, I require additional tickets for the Yarra Valley showcase & dinner at \$150 per person

No.  x tickets at \$150 each: \$

Dietary requirements:

### Retreat Closing drinks

The closing drinks is INCLUDED in the registration fee for delegates attending the full retreat.

### Friday, 19 July at RACV Healesville Country Club & Resort

- Yes, I WILL be attending the Retreat closing drinks  
 No, I WILL NOT be attending the Retreat closing drinks  
 Yes, I require additional tickets for the Retreat closing drinks at \$35 per person

No.  x tickets at \$35 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](http://taxinstitute.com.au/membership)

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





Signature:

Date of signature:





Join the conversation

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

