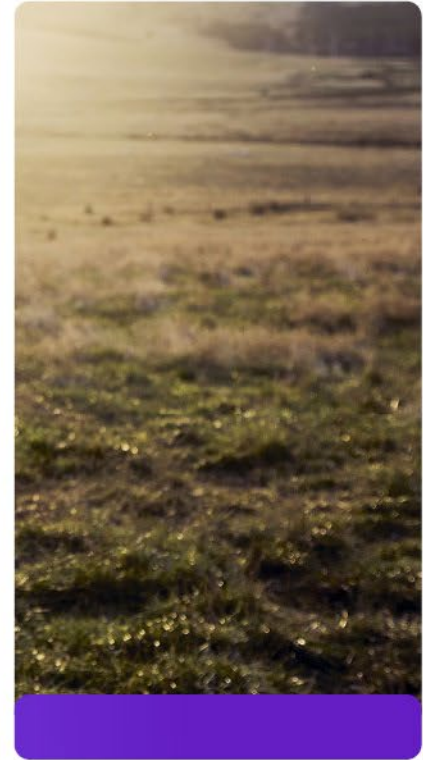


Agribusiness Intensive

1–2 May 2025

**voco Brisbane City Centre
& Online**

12 CPD hours



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

Andrew Jones, CTA, BDO, Chair, Intensive Organising Committee

Emma Carr, Macpherson Kelley

Karen Goodfellow, CTA, Goodfellow Tax Advisory

David Hall, CTA, Findex

Greig Hubbard, Deloitte

Tony Olsen, Flor Hanly

Gary Thomas, CTA, Gary Thomas Proprietary Limited



Welcome

On behalf of the organising committee, I am thrilled to welcome you to the ninth Agribusiness Intensive, to be held on 1–2 May 2025 both in-person at voco Brisbane City Centre and online. This year promises to once again provide expert insights from industry leaders and networking opportunities for practitioners around Australia. Whether you are attending in-person or online, this event is one not to be missed.

We are pleased to present a line-up of technical and practical sessions that will address the latest crucial tax, legal and commercial issues primary production businesses, and their advisers, face today. This year's program has been expertly curated by the committee to explore themes including:

- Corporatising the family farm
- Exploring both the legal and tax implications of alternative land uses
- FIRB & State Taxes
- Succession planning; and
- Recent changes affecting foreign investment into Ag.

Going beyond theory, the Agribusiness Intensive promises to provide advisers with practical tips and real-world war stories from experts with intricate knowledge in legal, accounting and everything in between. With the flexible offering of both online and face-to-face attendance every aspect of this event has been created with agribusiness professionals in mind, whether you have been advising primary production clients for decades or days.

We look forward to welcoming you to this exceptional event either face to face or online!



A stylized, handwritten signature in black ink, appearing to read 'Andrew Jones'.

Andrew Jones, BDO
Chair, Intensive Organising Committee

Early bird pricing offer
Register on or before Friday, 4 April 2025 to save!

Technical program

Day 1 Thursday, 1 May 2025

Time *AEST	Session
8:30 – 8:45am	Registration
8:45 – 9:00am	Welcome and opening address
9:00 – 10:00am	Session 1: Who owns Australia? Speaker: James ‘Wags’ Wagstaff, The Daily Times This session will uncover the shifting landscape of international investment in Australia—why overseas institutional investors are pulling back, while high-net-worth individuals and large-scale funds are stepping in. We’ll dive into the true picture of foreign ownership in agriculture, the fate of farm acquisitions, and the growing focus on securing supply over direct investment. Plus, explore the booming interest in intensive horticulture and large-scale MIT-backed deals.
10:00 – 10:30am	Morning tea
10:30 – 11:30am	Session 2: Dealings with Australian agricultural land – State tax issues and FIRB Speaker: Catherine Nufer-Bar, CTA, Hamilton Locke Despite efforts in harmonisation among legislation and compliance approaches, nuances remain. This session will consider the application of the relevant provisions and concessions that apply to primary producers, particularly in respect of: <ul style="list-style-type: none">• Inbound FIRB thresholds• Land tax – who’s exempt and who’s not• Duty – critical thresholds, exemptions and differences among States• Practical guidance; and• Recent case law.



Technical program

Day 1 Thursday, 1 May 2025 continued

Time *AEST	Session
11:30am-12:30pm	<p>Session 3: Beyond carbon – New opportunities and challenges for regional land owners Speakers: Matt Egerton-Warburton, Mills Oakley, Natalie Lonergan, Mills Oakley</p> <p>This session will discuss:</p> <ul style="list-style-type: none">• New regional land usage and their commercial and legal issues:<ul style="list-style-type: none">- Carbon – ACCU generation and sales (inset v offset)- Biodiversity- Solar- Wind- Oil, gas, hydrogen- Water- Farm stay/tourism• New and related commercial and legal issues for regional land owners:<ul style="list-style-type: none">- Scope 3 reporting- Land valuation- Tax structuring for new revenue streams
12:30-1:30pm	Lunch
1:30-2:30pm	<p>Session 4: Not just Carbon-Farming – The tax issues Speaker: Courtney Van Zyl, Findex</p> <p>As agribusinesses explore carbon farming and alternative land uses, understanding the complex tax landscape is critical. This session will provide expert insights into tax incentives, compliance obligations, and financial risks associated with carbon credits, biodiversity offsets, and regenerative agriculture. Attendees will gain clarity on evolving tax policies, deductions, and reporting requirements to maximize benefits while ensuring compliance. With real-world case studies and regulatory updates, this discussion will equip landowners, farmers, and agribusiness leaders with practical strategies for navigating tax complexities in sustainable land management.</p>
2:30-3:00pm	Afternoon tea

Technical program

Day 1 Thursday, 1 May 2025 continued

Time *AEST	Session
3:00–4:00pm	<p>Session 5: Medium and emerging enterprises Speaker: Rosie Cicchitti, Australian Taxation Office</p> <p>As medium and emerging enterprises grow, navigating ATO compliance becomes increasingly complex. This session, led by ATO representatives, will provide key updates on compliance programs, common tax risks, and strategies to meet regulatory obligations. Attendees will gain insights into the ATO's focus areas, including GST, payroll tax, and record-keeping requirements, as well as proactive steps to avoid audits and penalties. With practical guidance and case studies, this session will help businesses understand their tax responsibilities and ensure they remain compliant while scaling sustainably.</p>
4:00–5:00pm	<p>Session 6: Corporatizing the farm Speakers: Karen Goodfellow, CTA, Goodfellow Tax Advisory, Frederick Mahar, CTA, FM Mahar & Associates</p> <p>This session will break down the complexities of transitioning to a corporate operating structure—how to effectively and pragmatically tackle a change in models whilst considering available roll-overs versus entering an actual transaction. There will also be a discussion of the ongoing tax issues that come with operating through a company, such as Division 7A, franking accounts and accessing tax-advantaged gains.</p>
5:00pm	Networking Function



Networking function

Join your colleagues, peers and our esteemed presenters for an evening of drinks, canapes and networking.

Date: Thursday, 1 May 2025

Time: 5:00–7:00pm

Venue: Chelsea Lane, voco Brisbane City Centre

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

Dress: Business Casual

Technical program

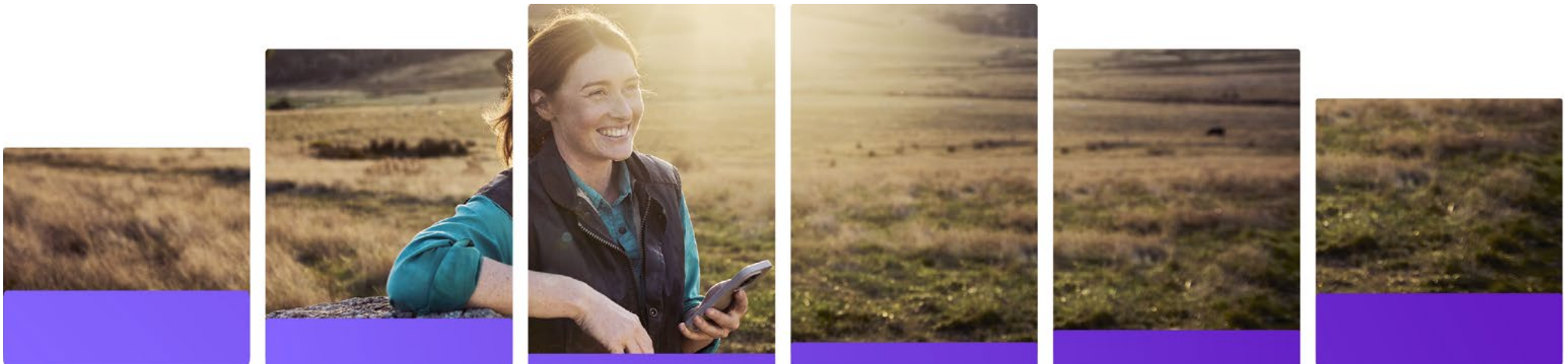
Day 2 Friday, 2 May 2025

Time *AEST	Session
8:30 – 9:30am	<p>Session 7: Succession planning for the family farm Speaker: Matthew Burgess, View Legal</p> <p>This session will tackle one of the biggest challenges in agribusiness—how to keep the family empire together when the next generation has different ambitions. We'll explore the complexities of trusts, Division 7A, estate planning, and structuring solutions like corporate models and trust clones. Through real case studies—including multi-generational partnerships, land ownership disputes, and succession strategies—we'll uncover what works (and what doesn't) when balancing family, fairness, and the future of the business.</p>
9:30 – 10:00am	Morning tea
10:00am – 12:00pm	<p>Session 8: Hot topics in Agribusiness Speakers: Stuart Ebbot, HWL Ebsworth, Greig Hubbard, Deloitte, Shaun McKinnon, BDO</p> <p>Join our panellists as they discuss hot topics in including Foreign Investments into Ag and getting the house in order.</p>
12:00 – 1:00pm	<p>Session 9: Managing family dynamics – Current state of play Speaker: Tony Eyres, Rounding Up</p> <p>This session will delve into the role of family charters, shareholder agreements, and governance frameworks in managing family dynamics within agribusiness. Experts will discuss best practices for structuring ownership, decision-making processes, and conflict resolution mechanisms to ensure long-term stability. Attendees will gain insights into establishing advisory boards, succession structures, and tax-efficient business models to support both family and commercial interests. With a focus on practical strategies, this session will provide the tools needed to maintain harmony while driving agribusiness growth.</p>
1:00 – 2:00pm	Lunch
2:00 – 3:00pm	<p>Session 10: Repairs and Maintenance in a natural disaster context Speakers: Adria Askin, CTA, McCullough Robertson, Melinda Peters, CTA, McCullough Robertson</p> <p>Recent fires, floods, earthquakes, cyclones and third party mandates have compelled significant outlays on building refurbishment. The task of characterising the refurbishment outlays is complex and brings into focus many facets of tax law including balancing adjustments, CGT events and rollovers. This session explores the repair/improvement dichotomy raised by outlays incurred to refurbish buildings incorporating practical case studies around:</p> <ul style="list-style-type: none">• Refurbishing buildings damaged by fires, floods, vehicle impacts and even earthquakes• Raising or jacking up buildings in flood areas• Mandated improvements for tenant; and• Problematic foundations and collapsing balconies in high rise buildings.

Technical program

Day 2 Friday, 2 May 2025 continued

Time *AEST	Session
3:00 - 3:30pm	Afternoon tea
3:30 - 4:30pm	Session 11: In the furrows Panelists: David Hall, CTA, Findex Facilitator: Gary Thomas, CTA, Gary Thomas Proprietary Limited In this dynamic panel session, seasoned professionals will share real-world “war stories” from their experiences working with farmers, family enterprises, and agribusiness investors. Panelists will discuss key lessons learned, common pitfalls, and strategies for navigating difficult client scenarios. Attendees will gain practical insights into risk management, structuring solutions, and advisory best practices to better support their agribusiness clients in an evolving landscape.
4:30pm	Intensive close



Presenters

Matthew Burgess, CTA, co-founded specialist firm View Legal in 2014, having been a lawyer and partner of one of Australia's leading independent law firms for over 17 years. Matthew's passion is helping clients successfully achieve their goals. Matthew specialises in tax, and estate and succession planning, providing strategic advice to business owners and high net worth individuals. He has been recognised in the Best Lawyers list since 2014 in relation to trusts and estates and either personally or as part of View Legal in Doyles since 2015 in relation to taxation, and since 2017 in relation to wills, estates and succession planning. In part leveraging off the skills he has developed working in the SME market space, Matthew has been the catalyst for a number of innovative legal solutions for advisers and their clients, including establishing Australia's first virtual law firm.

Stewart Ebbott is the State head of the firm's Corporate and Commercial Group and is a leading corporate lawyer with expertise in mergers and acquisitions, capital raisings, corporate governance, general corporate and commercial matters. Stewart has acted for both public and private companies on various transactions and focuses on M&A. He

also draws on his time as a senior in-house legal counsel at Virgin Australia. Stewart advises clients on local and cross border transactions and has significant experience in the Food and Agribusiness, Technology, Transport and Health sectors.

Matt Egerton-Warburton is an experienced corporate law partner who has practiced in New York, Hong Kong, London and Sydney. He is skilled in Mergers and Acquisitions (M&A), Corporate Governance, Cross-border M&A and Capital Markets with a specialty in Carbon Markets. Matt leads Mills Oakley's Carbon Market practice which advises landholders, Carbon Service Providers (CSPs), financiers, valuers, regulators, traders and other participants. We provide advice on the Commonwealth's Australian Carbon Credit Units (ACCU) Scheme that provides incentives for a range of organisations and individuals to adopt new practices and technologies to reduce their emissions or sequester carbon. Matt is also Chair of the Mulloon Institute – a globally recognised, not-for-profit, dedicated to regenerating and rehydrating regional landscapes and catchments.

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.

David Hall, CTA, is a Tax Partner at Findex and Crowe Australia based in Townsville. David regularly provides tax advisory services to the firm's North Queensland clients and other accounting and law firms on a large range of areas including: restructures, succession arrangements, business and property sales and acquisitions to ensure clients achieve their personal aims and tax-effective outcomes. David has over 40 years' experience is an expert on the small business CGT concessions and the agri-sector, and regularly deals with a large number of agri-clients through

both Findex and his tax consulting to other accounting and legal firms. David holds a Master of Taxation from the University of New South Wales, a Bachelor of Commerce from JCU, FCPA, Tax Agent, Chartered Tax Adviser.

Greig Hubbard, ATI, is a Partner in Deloitte's Business Tax Services practice with 18 years professional experience in providing taxation and legal advisory services. Greig has worked in Australia, the UK and South Africa managing tax functions for and providing tailored tax advice to clients, predominantly in the financial services, infrastructure and agribusiness sectors. Greig has advised clients on structuring and financing of large Australian infrastructure and capital projects and M&A transactions, including both inbound and outbound investments.

Natalie Lonergan is a specialist energy lawyer with over 30 years of Australian and international experience providing transactional and regulatory support to sponsors/developers throughout the lifecycle of gas projects and more recently hydrogen/ammonia, offshore and onshore wind, solar and battery storage projects and carbon management projects. Natalie is a Queensland native having grown up on cattle country in the Scenic Rim.

Presenters

Frederick Mahar, CTA, is the Managing Principal and Tax Specialist at FM Mahar & Associates, a private client group accounting and taxation practice firm in Southwest Victoria. Frederick has over 25 years' experience working within the profession with a particular interest in taxation of trust estates, capital gains tax, superannuation and corporate tax advice. Frederick is a proficient Chartered Tax Advisor, holds concurrent memberships with CPA Australia and CA ANZ, has completed a Master of Taxation degree at UNSW and is also a member of The Regional Tax Advisory Network, Victorian Tax Discussion Group and Society of Trust & Estate Practitioners.

Shaun McKinnon is an Advisory Partner with BDO in Brisbane, specialising in Corporate Finance and Restructuring services. Shaun's experience in Corporate Finance is primarily in the form of acquisition and vendor financial due diligence assignments and private capital raisings while his Restructuring experience includes a broad spectrum of advisory and formal roles assisting underperforming businesses and their financiers. Whilst Shaun provides expert advice across a broad spectrum of industries, he has established himself as a leader in the Food & Agribusiness

sector where he specialises in providing financial due diligence and advisory services for buyers, sellers and financiers. Shaun's Food & Agribusiness sector experience includes having acted for various parties across a range of transactions and roles including some of Australia's largest recent transactions.

Catherine Nufer, CTA is a specialist tax and structuring lawyer, specialising in state taxes including stamp duty, payroll tax and land tax in all Australian jurisdictions. She advises clients on transaction structuring, restructuring, tax opinions and often assists them with investigations, reviews and audits. She acts for a wide range of clients – from high net wealth individuals, privately owned groups, large multinationals and a range of small to large charities and not-for-profits. In addition to tax, Catherine has extensive knowledge of charities and not-for-profits law and assists clients across a range of different industries with regulatory, corporate governance and compliance issues. Her experience includes working with affordable housing education and training providers, arts and cultural organisations, health related charities, philanthropic and charitable trusts, research

organisations, retirement villages and aged care, religious organisations and public benevolent institutions. Catherine is a Chartered Tax Adviser with the Tax Institute of Australia and was listed in Best Lawyers 2024 for Not-for-profit and Charities Law.

Melinda Peters, CTA, is a specialist tax and duty lawyer, practising in all areas of direct and indirect tax – with a particular focus on the transaction taxes, structuring and funds management. A partner in McCullough Robertson's highly regarded taxation team and a chartered tax adviser, Melinda prides herself on achieving commercial outcomes and providing practical advice to clients. In her role, Melinda acts for a range of clients, from individuals to start ups, to large corporate clients and managed funds. She advises extensively on cross-border taxation issues and inbound and outbound investment structures, mergers and acquisitions, trusts and is experienced in advising and implementing a range of employee incentive and remuneration arrangements. She also assists clients with taxation and duty disputes and has experience in such matters before the Federal Court, AAT and Queensland Supreme Court. Melinda holds a

Juris Doctor from the University of Queensland and a Masters of Taxation from the University of Sydney.

Gary Thomas, CTA, is the principal of Gary Thomas Proprietary Limited, a specialist tax advisory firm. His clients are other accounting firms and legal practitioners who regularly refer their client matters to him for advice or opinions. Gary has been in practice for over 40 years, predominantly in the private group space with a focus on businesses and families in regional Australia. Gary has a particular interest in trusts and estates, along with management of tax controversies.



Venue and accommodation



voco Brisbane City Centre

85/87 N Quay, Brisbane City QLD 4000

Brisbane isn't lovingly called BrisVegas for nothing, and charming, playful voco Brisbane City Centre is right at home in the buzzing, sun-drenched Queensland capital. Conveniently located on the banks of the Brisbane River in a precinct undergoing an exciting renaissance, voco Brisbane City Centre's North Quay position delivers on premium yet unstuffy accommodation for the leisure-seeker and business traveller alike. With cushy bedding, vibrant art, smart in-room technology, and bathroom amenities that melt the stress of any day away, the 194 premium rooms are more than just a place to rest your head. In the morning, kick-start your day with a proper barista coffee and get the lowdown on where to go, what to see and where to eat in Brisbane from our warm, genuine staff.

At voco Brisbane sustainability is also at the forefront of every decision. They look after the planet with the same care as they look after their guests. You can relax knowing that everything from your super comfy bed to the bridgeable straws is designed to reduce their impact on the environment.

Getting there

voco Brisbane City Centre is approximately a 20-minute drive from Brisbane Airport.

For those in Brisbane, voco Brisbane City Centre is conveniently located a 10-minute walk from Brisbane Central Train Station.

Parking

Car parking is available within walking distance to voco Brisbane City Centre at [40 Tank Street, Brisbane](#).

Accommodation

Favourable room rates have been negotiated and secured at:

- voco Brisbane City Centre, book online via this [link](#).
- Hotel Indigo, directly adjacent to voco, book online via this [link](#).

Please note that as per hotel booking conditions, a credit card is required for guaranteed purpose when confirming the booking. Full payment will be taken upon check in unless otherwise specified. Cancellation is free until 6pm one day prior to arrival. 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 (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.

Networking function

Thursday, 1 May 2025

The Networking function will be held onsite at Chelsea Lane, voco Brisbane City Centre after the last session on day one.

The Networking function is included in the event registration fee for delegates, and additional tickets can be purchased for accompanying persons and guests at a cost of \$80.

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/ 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 virtually.	✓✓✓		

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

Discounts

Early bird registration

All registrations received and paid on or before Friday, 4 April 2025 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.

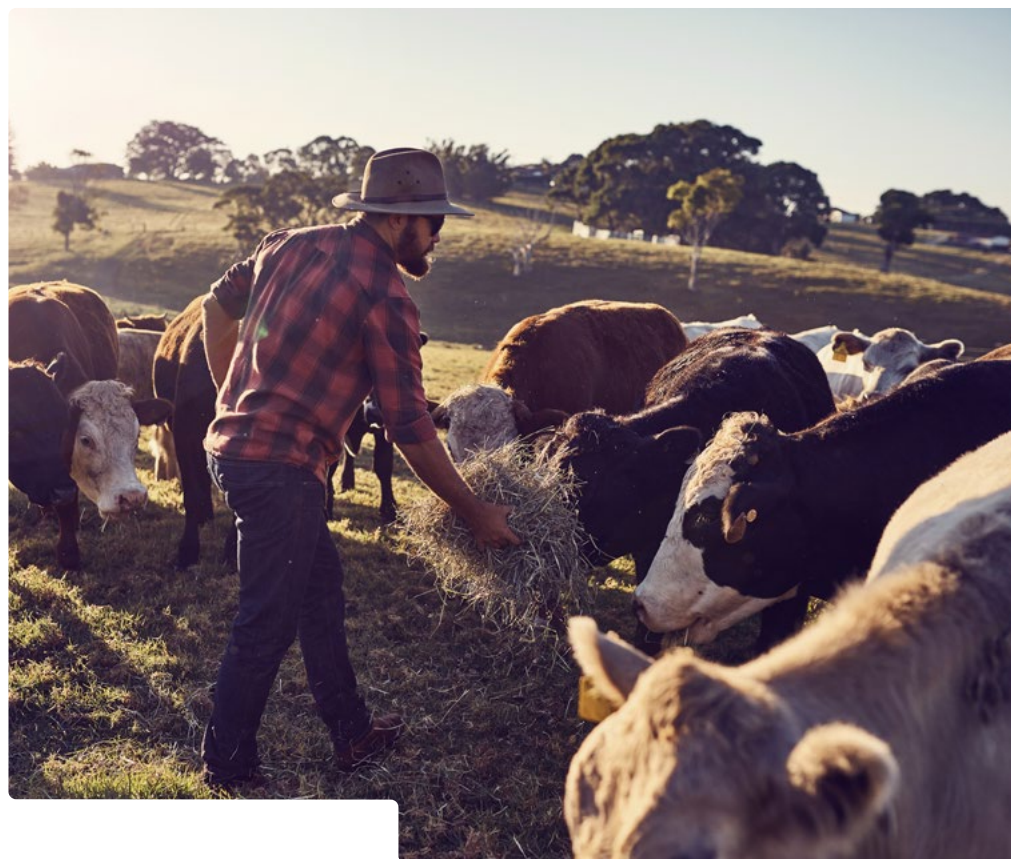
This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

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 13 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 4 April 2025	<input type="checkbox"/> \$1,495	<input type="checkbox"/> \$1,865	<input type="checkbox"/> \$1,795
Standard registration Register after Friday, 4 April 2025	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$2,065	<input type="checkbox"/> \$1,995

Online registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 4 April 2025	<input type="checkbox"/> \$1,495	<input type="checkbox"/> \$1,865	<input type="checkbox"/> \$1,795
Standard registration Register after Friday, 4 April 2025	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$2,065	<input type="checkbox"/> \$1,995

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.

Thursday, 1 May 2025 at voco Brisbane City Centre

- 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:



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
-  [instagram.com/thetaxinstitute_](https://www.instagram.com/thetaxinstitute_)

