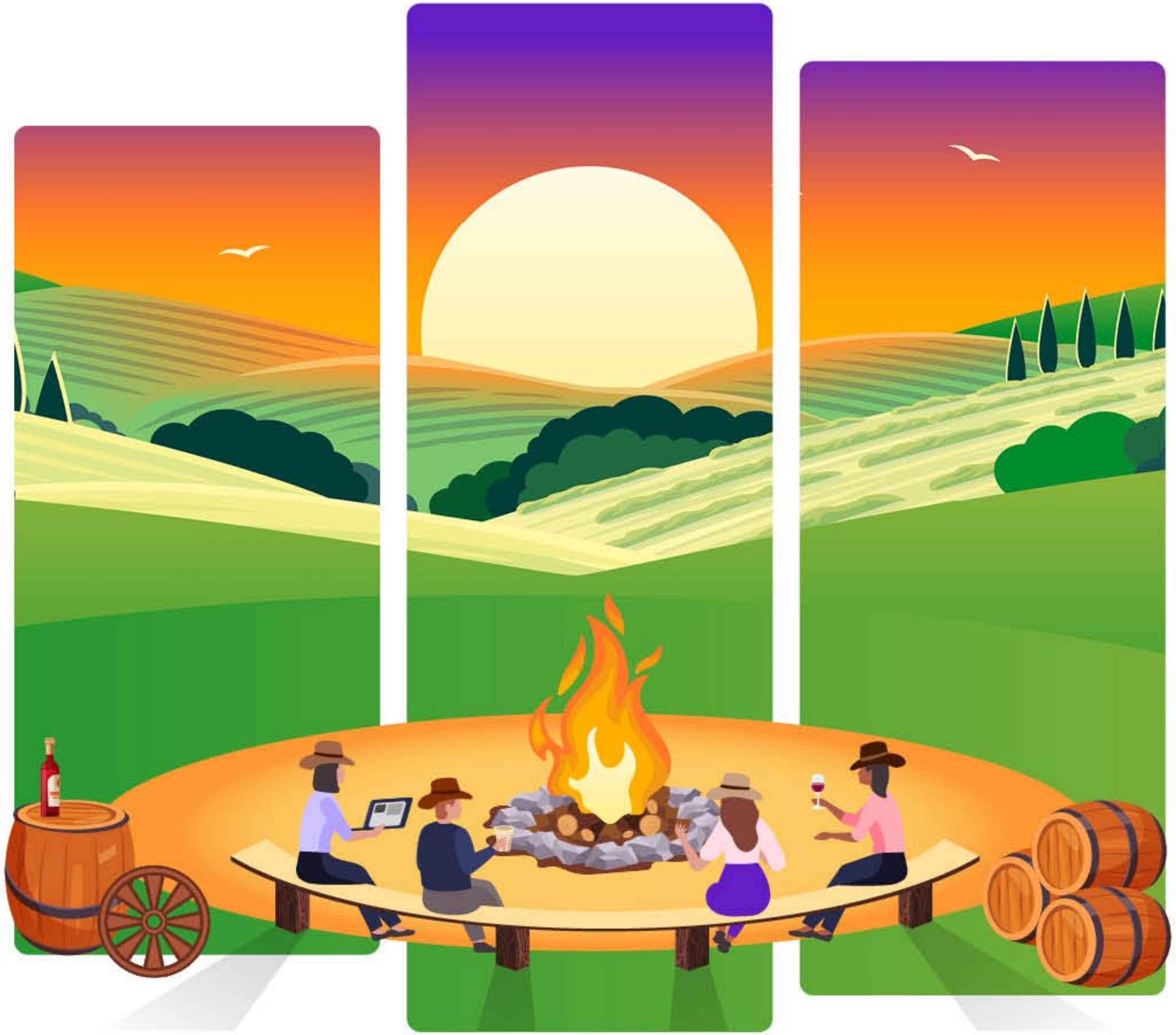
The Tax Institute

Barossa Convention

6–8 August 2025

Novotel Barossa Valley Resort

12 CPD hours



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

Sonia Mascolo, CTA, Bentleys (Chair, Barossa Convention Organising Committee)
Adrian Cartland, Cartland Law
Lisa Christo, NDA Law
Briony Hutchens, CTA, Finlaysons
Daniel Marateo, Cowell Clarke
Neil Oakes, CTA, Perks
Tom Paltridge, CTA, Grant Thornton
Jessica Pengelly, CTA, HWL Ebsworth Lawyers
Nicole Peterson, CTA, PKF Adelaide
Bradley Simpson, CTA, Moore Australia

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Welcome

The wild west of tax: Navigating the new frontier

I am pleased to invite you to join us in the scenic and historic Barossa Valley for The Tax Institute's Barossa Convention—a leading event in South Australia for tax professionals.

In today's environment, the tax landscape resembles a shifting frontier, with practitioners navigating a complex and often unpredictable regulatory terrain. From *Bendel* and Section 99B to the evolving determinations from the ATO, the pace and breadth of change call for resilience, readiness, and renewed expertise. This year's theme, "The wild west of tax: Navigating the new frontier" sets the tone, inviting delegates to examine the latest developments and equip themselves for the challenges ahead. Over the course of the Convention, you will gain 12 CPD hours through expertly curated sessions designed to sharpen your technical skills and strategic thinking.

I would also like to take this opportunity to thank our esteemed speakers, who have generously volunteered their time to share their insights and experience.

A premier program for tax professionals

This year's program has been carefully curated by the Convention Organising Committee to address the most pressing and complex issues facing tax practitioners today. Among the highlights, we will explore the implications of Bendel on Division 7A and the broader treatment of private company benefits, and delve into the statutory presumption in the Federal Court and ART—a timely reflection on the balance between taxpayer rights and revenue protection. We'll also examine the ATO's approach to debt recovery, the nuances of international tax issues for SMEs, and practical guidance for navigating trickier tax issues in deceased estates. Together, these sessions offer not only technical depth but also critical perspectives to support sound decision-making in a rapidly evolving landscape.

Beyond these core topics, delegates will benefit from a range of sessions covering Part IVA, small business CGT concessions, AI implementation, unit trust structuring, estate planning, and more.

Unique industry networking and idyllic destination

We are delighted to return to the Novotel Barossa Valley Resort, set amidst the rolling vineyards and picturesque countryside. On Wednesday evening, join fellow delegates for an engaging evening of informal networking. The Convention dinner, to be held at the Gomersal Winery, offers another excellent opportunity to connect with peers and speakers in a relaxed setting.

The Barossa Valley is an ideal destination to extend your stay—take advantage of the region's renowned cellar doors, gourmet experiences, and leisure activities including golf, cycling, and hot air ballooning.

Secure your place today and take advantage of early bird pricing. I look forward to welcoming you to the Barossa Convention, where we will chart a path forward together through today's dynamic and challenging tax environment.

Sonia Mascolo, CTA
Chair, Barossa Convention Organising Committee

Early bird pricing offer
Register on or before Friday, 11 July 2025 to save!

Technical program

Day 1 Wednesday, 6 August 2025

Time	Session
From 6:45pm	Registration

Welcome reception

Dust off your boots, tip your hat, and come dressed for the frontier—be it as a sharp-shootin' sheriff, a city-slicker, or a rogue outlaw ridin' solo.

Kick up some dust at the Novotel Barossa Valley Resort and enjoy an evening of beverages and grazing while mingling with your fellow delegates and our esteemed speakers.

Date: Wednesday, 6 August 2025
Time: 7:00–9:00pm
Venue: Novotel Barossa Valley Resort
Price: Inclusive for all full registration delegates
Additional tickets are $80 per person, see registration form for details
Dress: Business casual

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Technical program

Day 2 Thursday, 7 August 2025

Time	Session
8:00–8:45am	**Registration**
8:45–9:00am	**Welcome and President's address** **Speakers: Sonia Mascolo, CTA, Chair, Barossa Organising Committee, Tim Sandow, CTA, President, The Tax Institute**
9:00–10:00am	**Session 1: Is the statutory presumption of correctness in the Federal Court and AAT a burden on citizens or a safeguard for revenue** **Speaker: Mark Robertson KC, CTA, Queensland Bar** The High Court has recently pointed out that some judges fallaciously consider presumptions of law to be evidence of actual facts, or to give superadded weight to weak evidence. The ATO has pressed this fallacious view relentlessly, so much so that it has twisted their statutory duty to take a positive view of the fact into making negative conjectures of fact that they assert must be disproved. Some judges have fallen into the same error. In this session Mark Robertson KC will review the recent cases and discuss what is necessary before the Federal Court and ART to disprove the bases of assessment adopted by the Commissioner.
10:00–10:30am	**Session 2: The latest in Tax Policy and Advocacy** **Speaker: Julie Abdalla, FTI, The Tax Institute** The Tax Institute's Tax Policy and Advocacy (TPA) team continues to focus on educating, and advocating with and on behalf of, our members. The session will cover: • The latest advocacy activities of the TPA team and The Tax Institute's National Technical committees • Key advocacy matters affecting our members; and • The progress of key announced but unenacted measures (ABUMs).
10:30–11:00am	**Morning tea**

Technical program

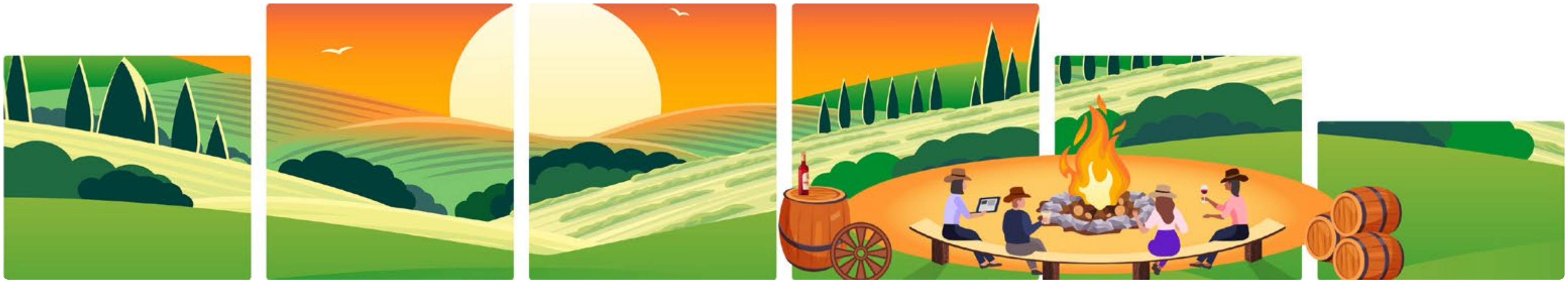
Day 2 Thursday, 7 August 2025 continued

Time	Session
11:00–12:30pm	**Session 3: Has Division 7A changed forever post-Bendel?** **Speaker: Michael Butler, CTA (Life), Finlaysons** Since 2009, the tax profession has been challenged by the question of whether an unpaid present entitlement (UPE) is a loan for Div. 7A purposes. The Full Federal Court's landmark decision in *Cmmr of Taxation v Bendel* [2025] FCAFC 15 now confirms a corporate beneficiary's UPE is not a loan for Div. 7A purposes. While *Bendel* appears to offer relief, it does not necessarily mean the end of Div. 7A for UPEs. *Bendel* also opens up complex questions regarding Subdivs. EA and EB, sec. 100A, and the ATO's next move(s). This session unpacks *Bendel* and its implications, and examines: • The judgments in *Bendel* and implications for the tax treatment of UPEs to corporate beneficiaries (and an update on the Commissioner's application for special leave to appeal to the High Court) • The practical implications of *Bendel* in managing clients' UPE arrangements, including: – the ATO's existing guidance and *Interim Decision Impact Statement* — what does the IDIS say and what doesn't it say? – legacy UPE arrangements and sub-trust structures – new UPEs and future planning strategies. • Potential application of Subdivs. EA and EB, and sec. 100A—and ATO administration of the law using PCGs • The need to account correctly for UPEs and avoiding Div. 7A issues going forward • Key risk areas for practitioners, including ATO review periods, cross-referencing with sec. 109K, and tax agent exposure; and • Practical examples to illustrate compliant and non-compliant scenarios.
12:30–1:30pm	**Session 4: Navigating ATO debt recovery measures** **Panellists: Simon Miller, Clifton Hall, Kelly Norwood, Australian Taxation Office, Lisa Pritchard, CTA, Taxation & Business Advisory Specialist** **Facilitator: Joshua Pascale, Cowell Clarke** The ATO have in recent times significantly increased their debt recovery action. This panel session will feature representatives from the accounting and insolvency professions, as well as from the ATO, who will together discuss best practice, planning issues and common traps for taxpayers who are subject to ATO action. Topics discussed will include: • How to effectively communicate with the ATO • Making submissions for interest and penalty remission • Negotiating payment plans • Responding to director penalty notices, garnishee notices and statutory demands; and • When to consider voluntary administration or small business restructuring.

Technical program

Day 2 Thursday, 7 August 2025 continued

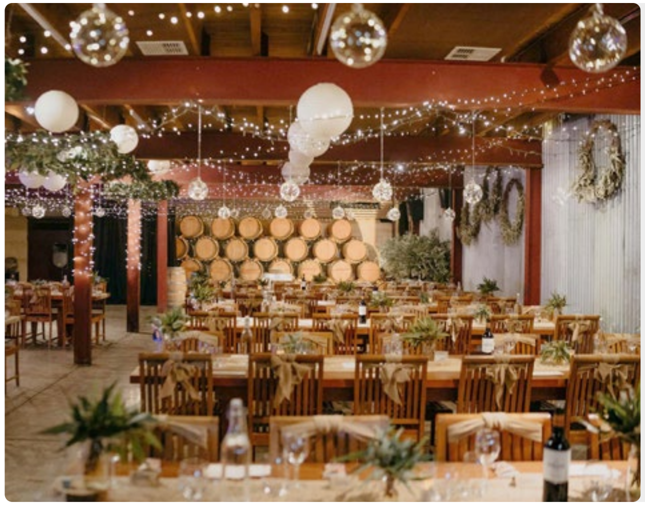
Time	Session
1:30 – 2:30pm	**Lunch**
2:30 – 3:30pm	**Session 5: Small business CGT and restructure roll-over masterclass** **Speaker: Daniel Marateo, Cowell Clarke** The small business CGT concessions and small business restructure roll-over (SBRR) remain powerful tools in the tax adviser's arsenal for achieving favourable outcomes in restructuring clients' asset holding and trading structures to achieve a wide a range of objectives. Rather than go over well-travelled ground, this session will delve into a range of specific tricky issues, traps and planning opportunities that advisers should be aware of in applying the concessions, including: • $2M Turnover and $6M MNAVT – are they really alternatives? • Counting liabilities for MNAVT purposes – getting it right • Calculating annual turnover – more than meets the eye • Connecting entities and effective use of section 152-78 trust nominations • Problems with classes of shares • SBRR and succession – can it be done; and • Optimising the concurrent use of SBCGT and SBRR.



Technical program

Day 2 Thursday, 7 August 2025 continued

Time	Session
4:00–5:00pm	**Session 6: Tax haven global structuring – What is and isn't possible** Speakers: Simon How, CTA, Bentleys, Sonia Mascolo, CTA, Bentleys The international tax landscape remains complex, with a range of regulatory considerations shaping cross-border structures. This session will explore the current parameters for effective global structuring, including what remains possible and where new limits have emerged. • How to manage your global effective tax rate • Can 'tax havens' be incorporated into an operating structure in the current tax landscape; and • What opportunities are there for setting up businesses wholly or partly in another jurisdiction. This presentation will use practical case studies to demonstrate the international tax structuring opportunities and pitfalls.
5:00–6:45pm	Free time
6:45pm	Bus departs for dinner
7:00–10:00pm	Convention dinner
10:00pm	Bus departs for Novotel Barossa Valley Resort



Convention dinner

Join your colleagues, peers and our esteemed presenters for an evening of fine dining and networking. Held at Gomersal Winery located in the picturesque location, nestled in the heart of the Barossa, Gomersal Wines brings rustic, country elegance to life.

Date: Thursday, 7 August 2025

Time: 7:00–10:00pm

Venue: Gomersal Winery

Price: Inclusive for all full registration delegates
Additional tickets are $200 per person, see registration form for details

Dress: Dress to impress and make an entrance, with cocktail attire or western-themed attire encouraged—think hats, boots, vests or a touch of old-time charm.

Technical program

Day 3 Friday, 8 August 2025

Time	Session
8:30 – 9:30am	**Session 7: From the first offer to the after-tax consequences – Navigating the wild west of family law disputes** **Speakers: Marissa Mackie, FTI, Norman Waterhouse and Elissa Riach, Norman Waterhouse** This joint session brings together the insights of both tax and family lawyers to explore the often conflicting intersection of tax-effective structuring and family law disputes. Using real-world case studies, the session will examine: • Key tax considerations in property settlements including CGT, Div 7A/UPEs and self-managed superannuation funds • The impact of taxation on the assets available for division and dealing with the ATO during property settlement negotiations • Navigating the division of assets held in various corporate structures; and • How early engagement between a family lawyer and an adviser can result in better outcomes for the client.
9:30 – 10:30am	**Session 8: Trickier tax issues in estates** **Speaker: Julie van der Velde, CTA, VdV Legal** Dealing with deceased estates always requires careful attention and the need to ensure your client, the LPR of the deceased, is aware of the extent of their personal liability for tax. This session is a practical look at some of the trickier and sometimes unexpected tax issues that may arise; sometimes many years after the death of the testator including: • Life interests • Non-resident beneficiaries or LPRs • Testamentary trusts; and • Land tax.
10:30 – 11:00am	**Morning tea**
11:00am – 12:00pm	**Session 9: Taming the wild west of AI Practical implementation for law firms** **Speaker: Michelle Stevens, HCLTech/Symplicit** Step into the new frontier of legal technology with Michelle Stevens from HCLTech/Symplicit. In this engaging session, we'll explore how to navigate the fast-evolving landscape of artificial intelligence in law-where opportunity and risk often go hand in hand. Discover why AI isn't a magic bullet, and learn how to approach its adoption thoughtfully. We'll discuss the real-world challenges of data security, ethical obligations, and client confidentiality, as well as the practical steps your firm can take to ensure AI becomes a reliable partner, not a loose cannon. Packed with actionable insights and expert guidance, this session will help you confidently chart a course through the complexities of AI implementation. Whether you're just starting your journey or looking to refine your current approach, you'll leave with the knowledge you need to harness AI's potential-without getting lost in the wild.

Technical program

Day 3 Friday, 8 August 2025 continued

Time	Session
12:00 – 1:00pm	**Session 10: Hang 'em high – Part IVA for PSI businesses** **Speaker: Mark Molesworth, CTA, BDO** This session explores the evolving landscape of Part IVA for PSI businesses, examining the technical foundations of the Commissioner's position, the clarity (or lack thereof) in the new guidance, and the practical implications for practitioners. Our speaker will discuss the following: • Background to the residual application of Part IVA – A Fistful of Dollars • Guidance from the ATO in Draft PCG 2024/D2 – A Few Dollars More • How helpful is the Commissioner's risk framework? – The Good, The Bad and The Ugly; and • Technical basis for the Commissioner's position on the application of Part IVA to PSI Businesses – Gunfight at the Part IVA Corral.
1:00 – 2:00pm	**Lunch**
2:00 – 3:00pm	**Session 11: New frontiers for charities and NFPs – Structuring, governance and joint venture/consolidation/M&A in ever changing and challenging operational environments** **Speaker: Timothy Stokes, FTI, HWL Ebsworth Lawyers** The environment in which charities and NFPs operate is ever evolving, requiring adaptation to new and novel challenges and the ability to successfully approach and harness new opportunities. These organisations are frequently being asked to do more and deliver more, whilst juggling declining public sector funding and a reduction in traditional sources of philanthropic funding. This session will explore how charities and NFPs can consider navigating these challenges and opportunities, taking into account relevant tax law, charity law and other considerations, having regard to: • What 'commercial' activities might be appropriate to undertake and how these can be structured; • Governance considerations for boards and key management personnel in deciding to undertake, or cease undertaking, certain activities; • Key structuring/restructuring and asset protection considerations charities and NFPs should consider as their operations evolve; and • How to approach and navigate the consolidation and/or merger of charitable and NFP organisations.

Technical program

Day 3 Friday, 8 August 2025 continued

Time	Session
3:00–4:00pm	**Session 12: Crossing borders in the wild west of tax – Migrating to Australia** Speaker: Timothy Cooper, CTA, Vialto Partners This session will explore the tax considerations for individuals moving to Australia to live and work, with a focus on the particular tax challenges facing individuals with global income and assets. The session will cover: • The current state of Australian tax residency • The role of temporary resident concessions • Medicare levy for migrants • Moving to permanent residency and the impact on global assets and investments, including pensions • The interaction of Double Tax Agreements with domestic Australian taxation; and • Case studies considering some of Australia's key migration pathways and associated challenges.
4:00–4:30pm	**Closing address and afternoon tea**

Presenters

Julie Abdalla, FTI, is the Head of Tax & Legal at The Tax Institute. Julie has practiced in the corporate tax teams of Big 4 and top tier law firms in Sydney and Melbourne. She has expertise in law and policy across a broad range of taxes and industry sectors. Prior to joining The Tax Institute, Julie gained experience across the spectrum of UK taxes while working at an international law firm in London. Julie is driven to achieve holistic tax reform, and has the depth of knowledge to advocate for members and the betterment of the tax system. Julie represents The Tax Institutes in several external forums including the ATO's National Tax Liaison Group and the Australian Treasury's Tax Treaty Advisory Panel, and has appeared as an expert witness in several Senate Committee inquiries. Julie has been recognised throughout the profession for her leadership and excellence in tax.

Michael Butler, CTA (Life), is the Partner in charge of the Finlaysons Tax & Revenue Group. Michael advises domestic and foreign clients on federal, international and state tax matters, and has a special interest in corporate restructurings, cross-border investment, property, wine and mining taxation, trusts, and estate and succession planning. Michael is a past chair of The Tax Institute's South Australia State Council and a regular contributor to Institute events. Michael was made an Honorary Life Member of The Tax Institute in 2024.

Tim Cooper, CTA, is a senior manager offering global mobility services as part of Vialto Partners' practice specialising in cross-border taxation issues. His clients include local, national and multinational companies as well as individual expats, athletes, sporting teams and associations. He focuses on understanding different perspectives and developing practical solutions, with a particular interest in tax planning and compliance for individuals travelling to and from Australia. He also assists clients to manage employment tax, payroll and equity scheme obligations as a result of globally mobile employees and executives.

Simon How, CTA, is a tax consulting partner at Bentleys SA and chair of the Bentleys national tax group. Simon provides specialist taxation advice with a focus on clients in the SME & International market. Simon regularly provides advice on a broad range of tax issues. Simon has over 28 years experience in public practice and with the ATO.

Marissa Mackie, FTI, is a Principal solicitor and counsel in her firm's Commercial and Taxation team at Norman Waterhouse, and specialises in taxation, banking and finance, regulatory litigation, insolvency, and commercial law. Her experience spans ASIC, the ATO, and private practice, complemented by a strong advocacy background at the Independent Bar. Marissa is also the current President of the Law Society of South Australia and a Director of the Law Council of Australia. She also sits as a sessional member at the South Australian Civil and Administrative Tribunal and has previously been the President of the Women Lawyers Association of Australia. She is committed to education, access to justice, and mentoring future lawyers. She also teaches at the University of Adelaide's Graduate Diploma of Legal Practice and, together with holding bachelor degrees in both Law and Commerce completed a Master of Law, specialising in Corporate, Commercial and Taxation at UNSW.

Daniel Marateo is a Senior Associate in Cowell Clarke's Tax & Revenue and Superannuation groups. Daniel advises on, and assists clients in dealing with revenue authorities in, various areas of Federal taxation law (including capital gains tax and GST), and State taxes including stamp duty, payroll tax and land tax across all Australian jurisdictions. Daniel also advises in relation to self-managed superannuation funds and structuring for tax and asset protection. Daniel has particular experience in acting on restructures of privately owned groups on a tax-effective basis in order to achieve a range of commercial outcomes.

Sonia Mascolo, CTA, is a Tax Partner at Bentleys in Adelaide. Sonia advises clients in a wide variety of areas including tax technical business / structuring advice, succession planning and wealth management strategies, international tax issues, indirect tax and state taxes. Sonia is also the go-to advisor for crypto-related matters, in particular Bitcoin. She has tax experience working in the legal profession, the ATO, a big four firm as well as university lecturing and tutoring positions.

Simon Miller is a Chartered Accountant and Registered Liquidator with almost 30 years' experience in insolvency, corporate recovery and advisory. This has

Presenters

included all forms of insolvency administrations including Small Business Restructuring and trade-on appointments, as well as working with accountants and solicitors in planning for (solvent) Members' Voluntary Liquidations. Simon regularly assists directors and advisors navigate their options when faced with taxation or other debts. As well as providing informal advice and undertaking forensic engagements, more recently Simon has carried out payroll compliance reviews for rectification to employees or due diligence purposes.

Mark Molesworth, CTA, is a tax partner at BDO and a member of The Tax Institute's SME Technical Subcommittee. Mark has many years of experience in advising taxpayers with respect to all areas of taxation, including CGT, FBT and income tax. He also provides taxation advice to other smaller accounting and legal practices in respect of their clients.

Kelly Norwood joined the Australian Taxation Office in 2002 and is an Assistant Commissioner in Frontline Services. The work undertaken across this business line is central to the administration of Australia's tax and superannuation systems. In Debt Assist we are focussed on providing quality telephony and processing services, promoting a level playing field by ensuring: Taxpayers are supported in their efforts to meet their obligations, taxpayers and their representatives understand the consequences of not meeting their obligations, and specialised support is provided to those in the taxpaying community most in need.

Joshua Pascale is a Senior Associate in Cowell Clarke's Tax and Revenue and Superannuation Groups. Josh advises property and business owners on a wide range of federal and state tax law issues, as well as pertinent superannuation and commercial law matters. Joshua has developed a particular interest in group restructures and the associated succession planning (private and business). Josh is a co-author of the Tax Institute's SMSF Income Stream Guide.

Lisa Pritchard is a CTA, with extensive experience advising clients across a broad range of taxation and accounting matters. Her career spans from working with small start-up enterprises to engaging with boards of publicly listed corporations, delivering clear, strategic guidance tailored to diverse business needs. Focusing primarily on small to medium enterprises in the Adelaide market, Lisa offers specialist expertise in tax planning, business structuring, capital gains tax, and compliance. She works across a variety of industries, helping clients make informed decisions that support both short-term operations and long-term growth. Known for her practical approach and deep understanding of the Australian tax landscape, Lisa is committed to delivering proactive, reliable advice that empowers businesses to thrive.

Elissa Riach is a Principal in the family law team of Norman Waterhouse Lawyers; one of the largest family law teams in South Australia. With qualifications in psychology and law, Elissa brings a unique and empathic perspective to her clients experiencing separation and family breakdown. Elissa has been assisting clients in all aspects of family law for over 20 years with a particular interest in high net worth individuals with complex legal structures, farming matters and families experiencing challenging family dynamics. Elissa works closely with accountants and taxation lawyers (including her co-presenter Marissa Mackie) to achieve the best possible outcomes for her clients. Elissa enjoys mentoring the next generation of family lawyers at Norman Waterhouse. Elissa is a member of the Family Law Section of the Law Council of Australia and the Australian Association of Collaborative Professionals.

Mark Robertson KC, CTA, conducts an Australia-wide practice specialising in revenue and trust law. Mark is listed as a leading tax KC by Chambers & Partners Asia Pacific and as 'Preeminent' by Doyle's Guide. He has appeared for commonwealth and state revenue authorities, Australia's leading corporate groups, high net wealth individuals and SMEs, including in estate and family law contexts.

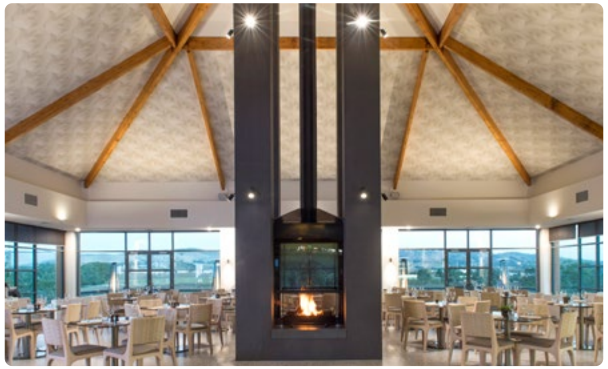
Michelle Stevens is a Principal Consultant at HCLTech/Symplicit, bringing over three decades of experience at the intersection of law and technology. Throughout her career, Michelle has guided firms through the challenges of digital transformation, helping them harness the power of AI and automation. Michelle is dedicated to demystifying emerging technologies. She has led countless workshops and advisory projects on AI implementation, adoption issues, and ethical best practices, earning a reputation for translating complex technical concepts into actionable strategies.

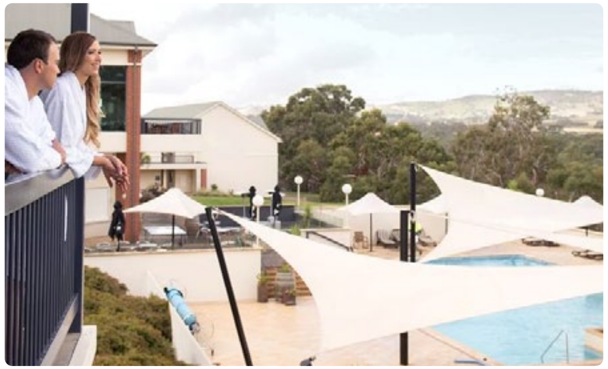
Presenters

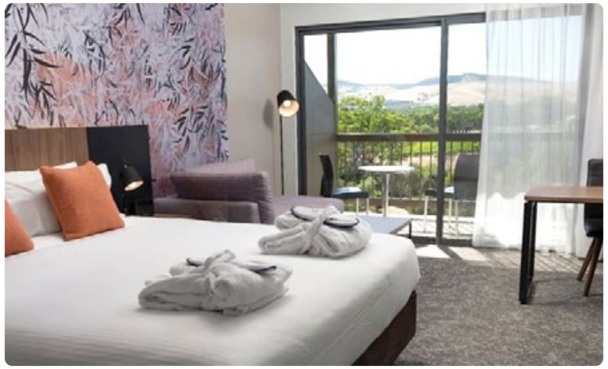
Timothy Stokes, FTI, is a partner at HWL Ebsworth Lawyers and is a tax, not-for-profit and charity law specialist. Tim works with complex family groups, private and listed companies, private equity and not-for-profit organisations across Australia. He has over 18 years of experience assisting clients to establish effective and efficient structures, manage complex tax positions, buy and sell assets and businesses, deal successfully with revenue authorities and design and implement comprehensive governance, succession planning and asset protection strategies. Tim is also a director of a number of NFP organisations and is the Co-Chair of the ATO's Not-For-Profit Stewardship Group (the ATO's key consultative body to the NFP and charity sector).

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

Venue and accommodation







Novotel Barossa Valley Resort

42 Pioneer Avenue, Rowland Flat, Barossa Valley

The Novotel Barossa Valley Resort located in the Barossa Valley district, is set in a natural amphitheatre overlooking Jacob's Creek. The guest rooms all feature private balconies and views of the Barossa Ranges. Both comfort and functionality are assured with iPod docking stations, connecting directly to 32-inch LCD TVs, pay TV channels, in-house movies, comfortable workstations, including ergonomic chairs and broadband access, a large chaise lounge to stretch out on and individually controlled air-conditioning.

An accommodation block has been reserved for delegates at the Novotel Barossa Valley Resort. Favourable room rates have been negotiated and room rates are quoted on a per-person, per-night basis (inclusive of GST) and include breakfast.

These favourable room rates have been extended from Tuesday (5 August) to Saturday (9 August).

Rooms are limited and must be booked prior to 11 July 2025. All accommodation bookings must be made directly with the venue via the self-book weblink here.

For alternative accommodation arrangements, please contact the Barossa Wine and Tourism Association on 1300 852 982 or visit the website https://www.barossa.com/.

Getting to the Novotel Barossa Valley Resort

The resort is located at 42 Pioneer Avenue, Rowland Flat, Barossa Valley. It is 85 kilometres (75-minute drive) from the Adelaide CBD and Adelaide Airport. The venue provides free on-site parking for guests. Car hire is readily available at Adelaide Airport and we encourage you to book when registering for this event.

Endota Spa

Immerse yourself in down-to-earth pampering at the Novotel Barossa Valley Resort's own Endota Spa. Offering unparalleled relaxation, indulge in a range of spa experiences for your body, face, soul and mind, just a stone's throw away from your room. Bookings in advance on 08 8524 0071 or barossavalley@endota.com.au are recommended to avoid disappointment.

Golf at the Tanunda Pines Clubhouse

Golf at the Tanunda Pines Clubhouse is just a two-minute stroll from the resort. This world-class golf course is a stunning 18-hole, par-72 course with 100-year-old gum trees lining fairways that undulate across the hilltops of the Barossa Ranges and it just a two-minute stroll from the resort. It is available either pre, during or post-convention. Contact the club direct on 08 8563 1200 to make your individual or group booking, with golf clubs and motorised golf carts available for hire. Bookings in advance are recommended to avoid any disappointment.

The Tasting Room

For those that are unable to go out and visit one of the 170 wineries in the Barossa, we will bring the Barossa to you! The Tasting Room offers complimentary wine tasting featuring a different winery every Thursday, Friday and Saturday. A wide range of wonderful Barossa products are also available for purchase at any time.

Event information

Welcome reception | Wednesday, 6 August 2025

The Welcome reception is included in the registration fee for delegates attending the full Convention. The Welcome Reception includes stand up dinner and drinks. Join us for an evening of networking and a showcase of Barossa's best food and wine.

Convention dinner | Thursday, 7 August 2025

The sun sets on the Barossa plains, and the time has come for an evening where the bold and the brave gather under one roof. Join us for the Barossa Convention Dinner—*a night where legends of the tax frontier unite*.

This year our convention dinner will be held at a historic boutique winery – Gomersal Winery. Nestled in the heart of the iconic Barossa Valley, Gomersal Winery brings rustic, country elegance to life. Celebrate the achievements of members in the local Tax Community with an evening of fine-dining, networking and of course wine.

Dress to impress and make an entrance, with cocktail attire or western-themed attire encouraged—think hats, boots, vests or a touch of old-time charm. This unforgettable event is included in the registration fee for delegates attending the full convention.

Continuing Professional Development (CPD)

Attendance at the Convention 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 Convention.

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/ convention lunches	Welcome reception and convention dinner*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓

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

Full convention registration includes participation in the full technical program, electronic access to all available materials via the Barossa Convention Virtual Attendee Hub, attendance at the Wednesday Welcome Reception and Thursday Convention Dinner and all refreshments during convention hours. Registration fees do not include travel, accommodation, or hotel incidentals.

Discounts

Early bird registration

All registrations received and paid on or before Friday, 11 July 2025 will be entitled to an early bird discount.

Group discounts

Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

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

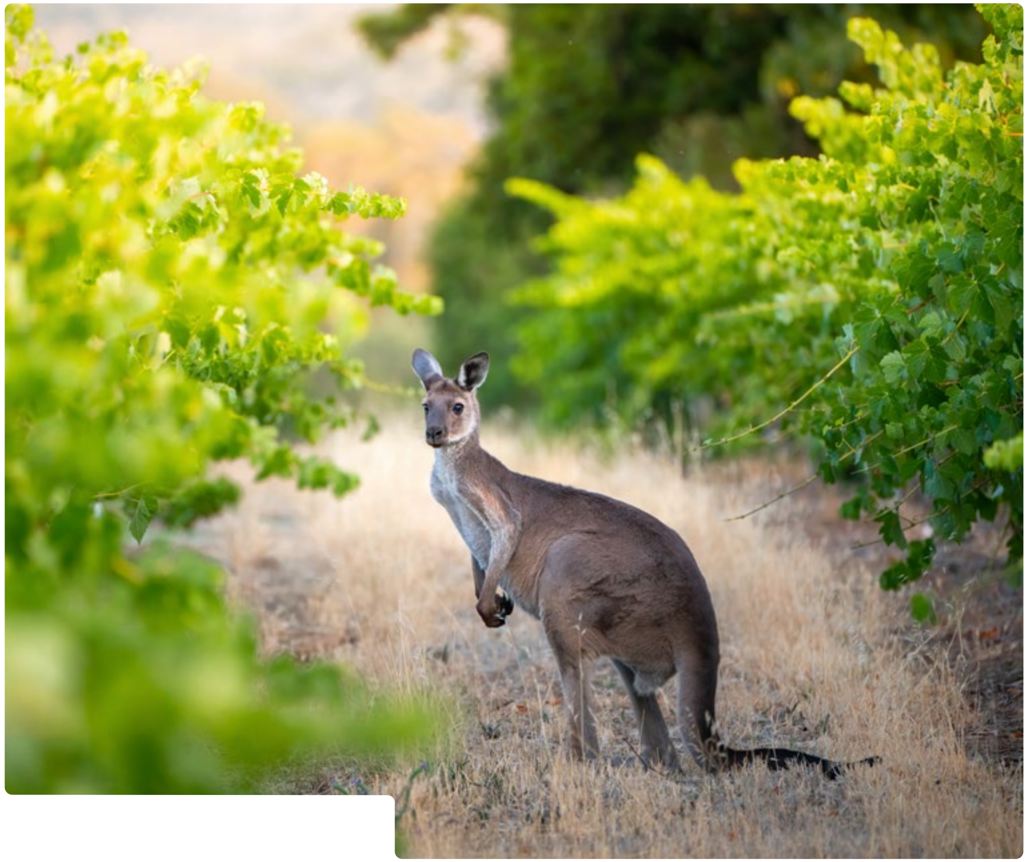
Group discounts

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.

Register now!

Register online ▶

Register via form ▶
included in this brochure



The Tax Institute

Barossa Convention
Registration form

44594 | 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 17 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 11 July 2025	☐ $1,795	☐ $2,190	☐ $2,095
Standard registration Register after Friday, 11 July 2025	☐ $1,995	☐ $2,390	☐ $2,295

☐ 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 Convention.

Wednesday, 6 August: Novotel Barossa Valley Resort

☐ 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:

Convention dinner

The Convention dinner is INCLUDED in the registration fee for delegates attending the full Convention.

Thursday, 7 August: Gomersal Winery

☐ Yes, I WILL be attending the Convention dinner OR

☐ No, I WILL NOT be attending the Convention dinner

☐ Yes, I require additional tickets for the retreat dinner at $200 per person

No. ______ x tickets at $200 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: 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

JOIN TODAY

***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 $230 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: DD/MM/YYYY

25-026EVT_05/25

3 Payment summary

Registration fees	$
Additional guest tickets – Welcome Reception ($80 each)	$
Additional guest tickets – Convention dinner ($200 each)	$
Total payable	$

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

4 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

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To register **Email** customeradmin@taxinstitute.com.au **Mail** Level 21, 60 Margaret Street, Sydney NSW 2000 **Online** taxinstitute.com.au

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