

Death & Taxes Conference

23–24 October 2025

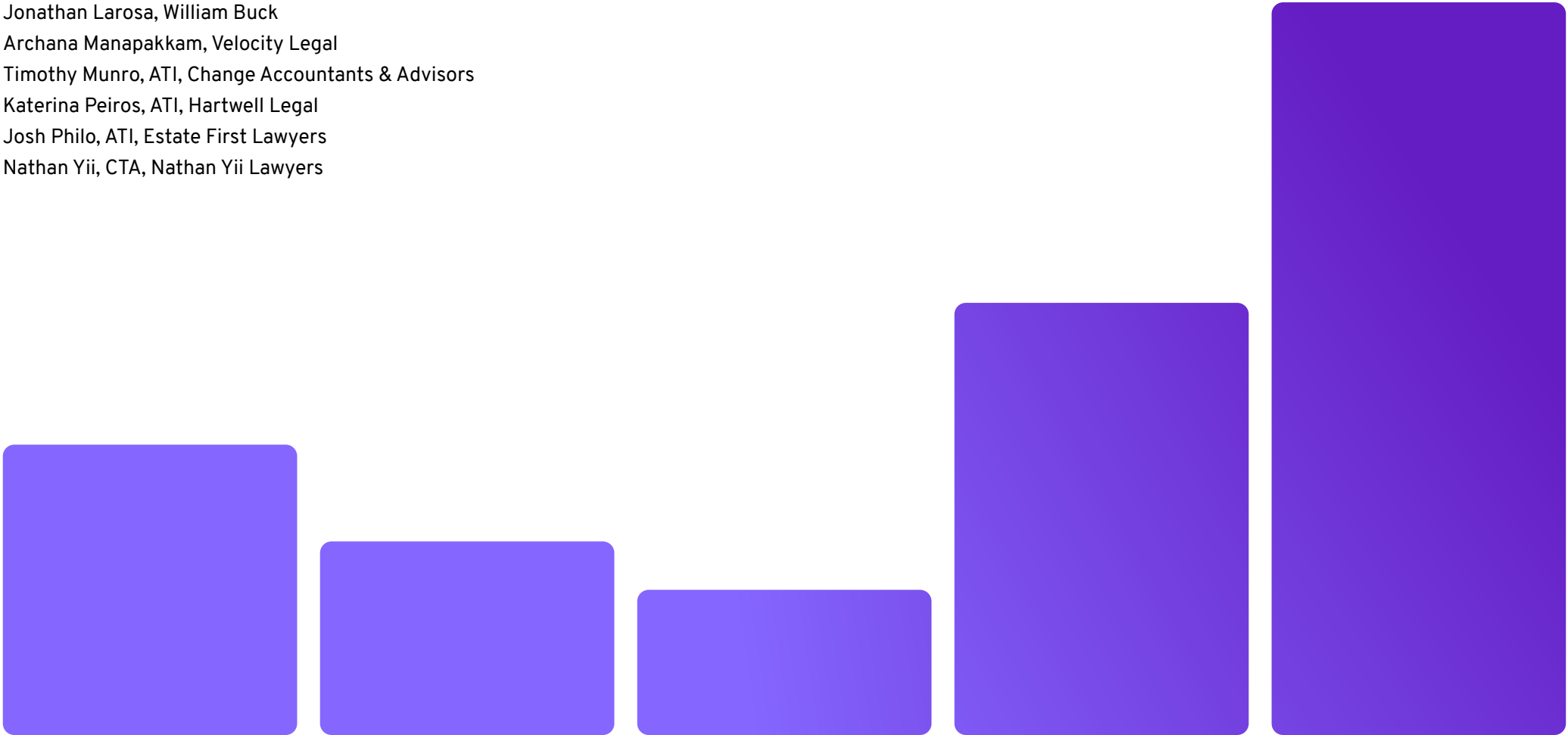
The Calile Hotel & Online

12 CPD hours



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

- Todd Bromwich, Hall & Wilcox, Chair, Death & Taxes Conference Organising Committee
- Neil Brydges, CTA, Sladen Legal
- Neal Dallas, CTA, BusinessDEPOT
- Yikai Hoe, CTA, Provident Lawyers
- Ann Janssen, ATI, Estate First Lawyers
- Jonathan Larosa, William Buck
- Archana Manapakkam, Velocity Legal
- Timothy Munro, ATI, Change Accountants & Advisors
- Katerina Peiros, ATI, Hartwell Legal
- Josh Philo, ATI, Estate First Lawyers
- Nathan Yii, CTA, Nathan Yii Lawyers





Welcome

It is my pleasure to invite you to this year's Death & Taxes conference. This national event is Australia's leading estate administration taxation event and a 'must attend' event for tax and legal practitioners working in succession planning and estate administration.

As Australia experiences its largest ever intergenerational wealth transfer, and we face rapidly ageing client bases and complex business and financial arrangements, it is more important than ever to upskill in the unique tax issues in succession planning and estate administration. Australia is also seeing unprecedented growth in estate litigation and increasing risks for executors, which tax and legal practitioners must competently manage.

Thank you to this year's organising committee for their time and enthusiasm in putting together yet another program of insightful and current topics for a range of practitioners. All sessions will feature a mix of technical education and practical guidance, with the opportunity to ask questions of our speakers and to network with delegates.

This year's conference include sessions on estate disputes and settlements, distributions from foreign trusts, managing trading businesses after death, primary production land in the estate plan, and a hotly-contested debate on life interests between leading practitioners. We are also pleased to welcome to ATO back to provide an in-person update on their current focus areas, recent administrative guidance, and practical tax compliance issues in estate administration.

I hope you will join us in October at the Calile Hotel in Brisbane or online for a two-day expansive technical program with industry experts from across the nation. We look forward to welcoming you again to this exceptional event.



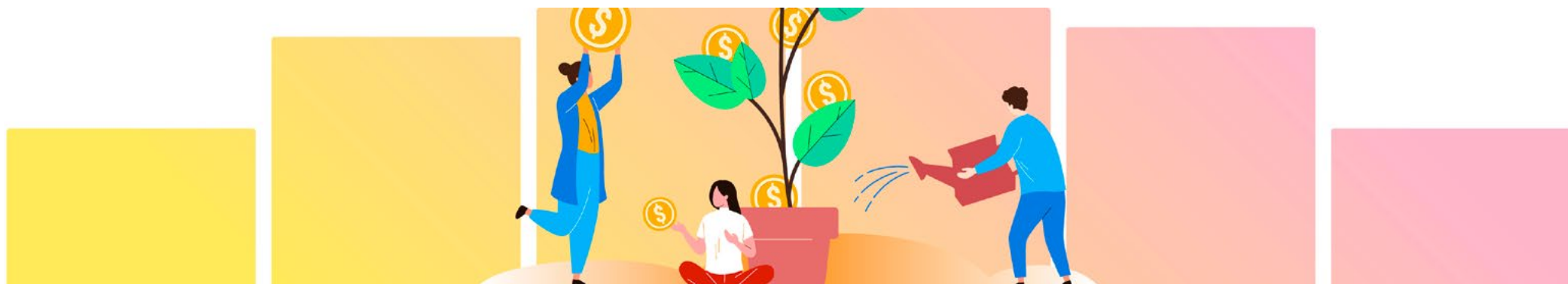
Todd Bromwich
Chair, Death & Taxes Organising Committee

Early bird pricing offer
Register on or before Friday, 19 September 2025 to save!

Technical program

Day 1 Thursday, 23 October 2025

Time *AEST	Session
8:30 – 9:15am	Registration
9:15 – 9:30am	Welcome and opening address
9:30 – 10:30am	Session 1: Tax implications of settlements – Common claims, issues and recent cases Speaker: Justin Byrne, CTA, QLD Bar Leading Barrister, Justin Byrne, will summarise recent cases concerning issues around wills and estates and the implications of those cases on family provision claims and trends the barrister is seeing in litigation in this space.
10:30 – 11:00am	Morning tea
11:00am – 12:00pm	Session 2: Tax Masterclass Speakers: Joanne Casburn, FTI, Cooper Grace Ward Lawyers, Melinda Ranson, Cooper Grace Ward Lawyers This session is a worked example to draw out and apply some of the principles from recent cases and developments to a matter an accountant or solicitor may encounter in practice. This session is intended to be interactive with delegates contributing to the discussion from their own experiences.



Technical program

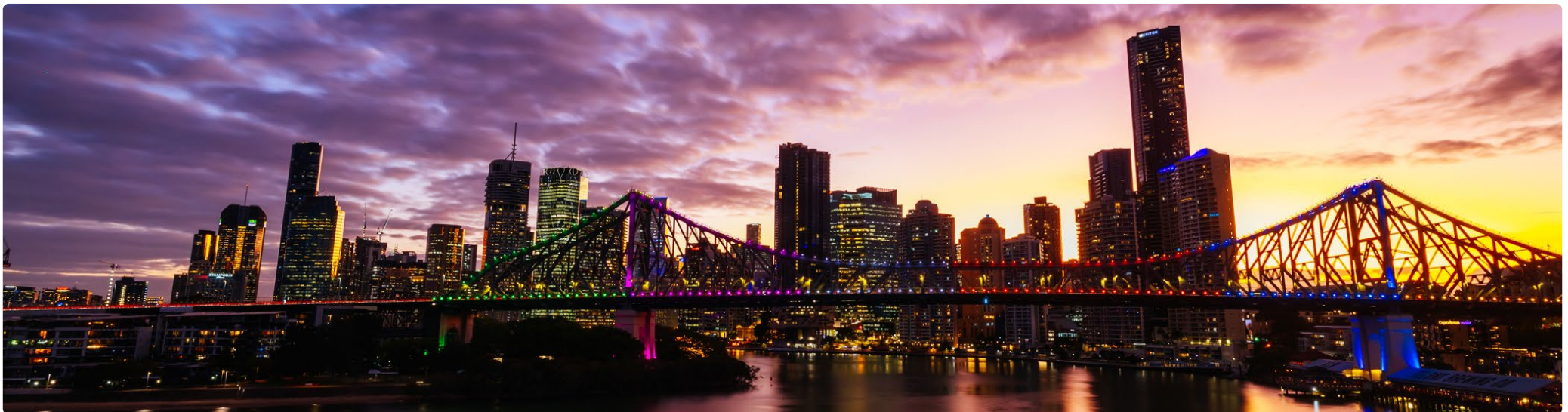
Day 1 Thursday, 23 October 2025 continued

Time *AEST	Session
12:00–1:00pm	<p>Session 3: ATO focus areas</p> <p>Speaker: Anthony Bach, CTA, Australian Taxation Office</p> <p>Facilitator: Julie Abdalla, FTI, The Tax Institute</p> <p>Join Assistant Commissioner Anthony Bach and The Tax Institute's Head of Tax and Legal, Julie Abdalla as they discuss the ATO focus areas impacting advisers in the deceased estates space and recent ATO administrative guidance materials.</p>
1:00–2:00pm	Lunch
2:00–3:00pm	<p>Session 4: How protected are your assets?</p> <p>Speaker: Patrick Ellwood, FTI, Clover Law</p> <p>With the increasing wealth of most Australians over the last 5 to 20 years, combined with the perception (whether real or otherwise) of the increased possibility of claims against their assets / estates, there appears to be an upsurge in demand for asset protection advice. Such advice used to be given almost off-hand by the accountant/lawyer as a throw away add-on but clients are now seeking more nuanced and bespoke asset protection strategies. Such advice walks the fine line of having to balance both the legal and accounting objectives of the client in the present, whilst also trying to peer into the crystal ball of possible claims that might arise in the future. This session will provide practical guidance about asset protection strategies that can be available and what to look out for.</p> <p>This session will cover:</p> <ul style="list-style-type: none">• Asset protection strategies for bankruptcy / business risk v estate claims: how the two strategies differ in practice, and how the tax planning objectives of the client can add another dimension into the mix• How asset protection strategies (for bankruptcy) can thwart the estate plan and what to do about it, and specifically the use of family trusts for asset protection and the problems that can arise as a result• How NSW notional estate provisions impact asset protection in estates• Gift and loan back / Vestey Trust arrangements:<ul style="list-style-type: none">– Any further developments following on from Re Permewan– Are these arrangements still viable in light of authorities– The traps to look out for when using promissory notes – how to do them properly• How to unwind the gift and loan back strategy after death (to enable to estate plan to take effect)• Where estate litigation / asset protection litigation may be headed in the future; and• The possible tax implications / traps to look out for in respect of the above strategies, and generally, in respect of asset protection.
3:00–3:30pm	Afternoon tea

Technical program

Day 1 Thursday, 23 October 2025 continued

Time *AEST	Session
3:30–4:30pm	<p>Session 5: Modernising legacy trusts and optimising outdated trust deeds</p> <p>Speakers: Dr Phil Bender, CTA, Victorian Bar, Nathan Yii, CTA, Nathan Yii Lawyers</p> <p>Setting up a trust is not just a ‘set and forget’ exercise. Trustees need to periodically review and if necessary, amend trust deeds to modernise them for tax, succession, investment and other administrative purposes. This presentation will cover the following:</p> <ul style="list-style-type: none">• Common types of amendments such as extending the vesting date, broadening the beneficiary class, changing the appointor and guardian and exclusions of foreign beneficiaries• Examining the trust deed as a whole and understanding the trustee’s powers• Examining the amendment power – a broad or a narrow amendment power• Tax amendments such as the definition of income and adding a streaming power following the Bamford case• Passing on control of the trust – the succession of the appointor and guardian roles• What if the trust deed does not have an amendment power? What are options for court-ordered variations and who should be a party to the proceedings? Case update: <i>Re EM McPherson</i> [2024] VSC 744; and• Avoiding trust resettlements in light of Clark’s case, TD 2012/21 and TR 2018/6.



Technical program

Day 1 Thursday, 23 October 2025 *continued*

Time *AEST	Session
4:30 – 5:30pm	<p>Session 6: AI and its impact on estates Speaker: Adrian Cartland, Cartland Law</p> <p>AI is now an integral part of professional practice, but using it effectively in estate work requires more than a subscription to a public model. This session draws on practical systems and workflows implemented in my own firm to show how AI can transform estate practice while maintaining professional and ethical standards.</p> <p>This session will cover:</p> <ul style="list-style-type: none">• How to build your own Retrieval Augmented Generation system that consistently produces work above the level of base models and eliminates hallucinations.• How I used AI to complete four years of bookkeeping for 30 entities in just three weeks.• Managing privacy, privilege, and “shadow AI” use in your firm to ensure compliance while fostering safe innovation.• Why AI can reduce costs for clients, expand demand for legal services, and simultaneously increase the need for skilled junior staff; and• How to teach your staff to use AI effectively and why “play” is an important element to incorporate into firm culture. <p>Attendees will gain practical, tested strategies to implement AI in their own estate practice, improving productivity, compliance, and client service.</p>
5:30pm – 7:30pm	Networking function



Networking function

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

Date: Thursday, 23 October

Time: 5:30–7:30pm

Venue: The Calile Hotel

Price: Inclusive for all delegates
\$80.00 each for additional tickets, available to purchase at registration

Dress: Business casual

Technical program

Day 2 Friday, 24 October 2025

Time *AEST	Session
8:30 – 9:30am	<p>Session 7: Entitlements and taxation of estate income Speaker: Glenn Davies, CTA, BNR Partners</p> <p>Think probate was painful? Wait until you meet section 99A and its charming friends.</p> <p>This session will assist practitioners in determining when an Executor or the estate's beneficiaries are liable to income tax on estate entitlements.</p> <ul style="list-style-type: none">• Identifying the different stages and timing of entitlement in an estate's administration• Identifying who is liable for income tax on estate income and capital gains at each entitlement stage• Refresh on Income Tax Ruling IT 2622 and review of current ATO website guidance to practically identify when an Estate is fully administered for income tax purposes• Simplifying the different income tax rates that can apply to Executors: Section 99 versus 99A, the '3 year' concession, and the 50% general CGT discount• Under what circumstances should an Executor apply for a section 99A determination from the ATO for concessional income tax rates?• Tips and traps when applying Division 128 CGT relief (also touching on the main residence exemption)• Can a beneficiary be, or be made, entitled to income or capital gains before the Estate is fully administered? When should Executors choose to make beneficiaries entitled to estate income and capital gains? and• Tips and traps for distributing estate income and assets to charities.
9:30 – 10:30am	<p>Session 8: Australian beneficiaries of foreign trusts – Not just in your lifetime Speakers: Fletch Heinemann, CTA, HLS Tax Law, Sarah Lancaster, HLS Tax Law</p> <p>The increased global mobility of individuals, together with ever-expanding family networks, mean that cross-border trust and estate tax issues are, in many instances, "the new black".</p> <p>The rules in this space are complex, an area of ATO compliance activity, and can apply to deceased estates, not just inter vivos trusts. This session will include discussion of:</p> <ul style="list-style-type: none">• The application of section 99B to deceased estates including the ATO views in TD 2024/9 and PCG 2024/3• Residency of trusts and estates including common pitfalls when succession planning• Transfer of wealth across borders and family generations and whether the transferor trust rules could apply; and• Documentation and other considerations to give the greatest chance of surviving ATO scrutiny.
10:30 – 11:00am	Morning tea

Technical program

Day 2 Friday, 24 October 2025 continued

Time *AEST	Session
11:00am–12:00pm	<p>Session 9: Superannuation death benefits – Key issues and practical considerations</p> <p>Speaker: Laura Hanrahan, Hall & Wilcox</p> <p>Superannuation death benefits continue to raise complex legal and tax considerations for practitioners, both during estate planning and in the administration of deceased estates. Tax implications frequently take centre stage in these matters. This session will examine a range of current issues and practical challenges associated with navigating the death benefit landscape, including:</p> <ul style="list-style-type: none"> • The evolving distinction between “death benefit” and “member benefit” characterisation for payments made around the time of a member’s death • Tax-effective strategies for dealing with death benefits payable to non-tax dependants, beyond early withdrawals • The ATO’s current position on the requirement to pay death benefits “as soon as practicable” following the member’s death, particularly where delays arise due to probate, challenges to binding death benefit nominations, or illiquid fund asset • The potential consequences of failing to pay out a death benefit within the required time frame under the Income Tax Assessment Act 1997, including the implications of sections 99 and 99A; and • The potential impact of Division 296 on death benefit payments, whether through direct application or indirectly through fund structure and distribution timing. <p>This session aims to equip practitioners with up-to-date insights and strategies to better manage the complex interplay between superannuation, tax law, and estate administration.</p>
12:00–1:00pm	<p>Session 10: Managing and transitioning trading businesses</p> <p>Speaker: Sally Preston, CTA, Smart Solutions Tax & Business Advisory</p> <p>This session will discuss:</p> <ul style="list-style-type: none"> • What if a sole/key owner or controller of a trading business passes away • The impact of death and different issues if the business is carried on by sole trader, partnership, trust or company • Implications for executors and beneficiaries • What helpful / unhelpful provisions can a Will include • Any ATO administrative concessions or elections • What is the executor’s role regarding the operation of the business • How to effectively manage during administration and transition control, and can control be transferred while administration of estate is ongoing and before ownership transfers? • Impact on planned sale of business / structure, and what if contract already inked? • Insurance payouts; and • Impact on availability of small business CGT concessions where ownership changes upon death.
1:00–2:00pm	Lunch

Technical program

Day 2 Friday, 24 October 2025 *continued*

Time *AEST	Session
2:00–3:00pm	<p>Session 11: Primary production land in the estate plan Speaker: Matthew Burgess, CTA, 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, 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>
3:00–3:30pm	Afternoon tea
3:30–5:00pm	<p>Session 12: The great debate – Life Interests... best thing since sliced bread or a poison chalice? Speakers: John Ioannou, CTA, Mapcherson Kelley, Archana Manapakkam, Velocity Legal, Bryan Mitchell, FTI, Mitchell's Solicitors, Nicole Treacey, Mapcherson Kelley Adjudicator: Ann Janssen, ATI, Estate First Lawyers</p> <p>Life interests have long been used by will makers wanting to benefit one beneficiary post death while preserving the capital for other beneficiaries later down the track. It has been a favourite strategy to preserve a roof over the head of a surviving spouse or a live in adult child, while controlling the asset from the grave for ultimate beneficiaries. But with people living longer than ever before, and more and more sophisticated estate planning strategies being developed, are they the answer?</p> <p>This session will explore the pros and cons of life interests in various situations, including the federal tax and State duty implications, the risk and ramifications of getting it wrong, and whether there are other estate planning strategies available to your client that give better results.</p> <p>Join us for a lively debate between estate and tax lawyers and work out for yourself whether Life Interests are the best thing since sliced bread or a poison chalice to be avoided.</p>
5:00pm	Conference close

Presenters

Julie Abdalla, FTI, is the Head of Tax & Legal at The Tax Institute. Julie has practiced in the tax teams of Big 4 and top tier law firms in Sydney and Melbourne, and at an international law firm in London. She has expertise in law and policy across a broad range of taxes and industry sectors. 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 leads the Tax Policy & Advocacy team and has oversight of The Tax Institute's National Technical and State Taxes Committees comprised of over 150 volunteers. She 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. Julie provides strategic and technical advice to Government and other stakeholders, 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. She has been awarded a number of scholarships and awards including the International Bar Association Taxes Committee Scholarship, the Australian Lawyers Weekly 30 Under 30 Award in

Tax, and a prize from the University of Oxford. Julie holds a Bachelor of Arts and a Juris Doctor from the University of Sydney, and a Master of Laws from the University of Melbourne, part of which was completed at the University of Oxford.

Anthony Bach, CTA, is an Assistant Commissioner at the ATO and leads the Remuneration, Individuals and Charities work focus group in the Tax Counsel Network. With over 20 years' experience in the ATO, he previously worked as a senior director advising on privately-owned groups (with a particular focus on Division 7A), superannuation funds and public companies. He is a Chartered Tax Adviser with The Tax Institute and was named the "SME Tax Adviser of the Year" in 2018.

Dr Philip Bender, ATl, is a barrister at the Victorian Bar. He is the author of Bender's Australian Stamp Duties, published by the Tax Institute. He acts in Federal and State taxation, superannuation, and trusts and estates matters for taxpayers and revenue authorities. In the trusts and estates area, he has acted in many taxation disputes involving trusts issues, and has acted in many trusts and estates

matters involving, amongst other topics, trust deed and will interpretation, alleged breaches of trustee and executor duties; will capacity issues; TFM claims; executor and trustee removal applications; judicial advice; charitable trusts; and superannuation death benefits disputes.

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.

Justin Byrne, CTA, is a barrister at the Queensland Bar. Prior to joining the bar he was a solicitor for 20 years where he specialised in taxation and revenue law. He advises on a wide range of complex taxation issues, including income tax, CGT, GST, payroll tax and stamp duty. He has qualifications and extensive experience in both law and accounting and is uniquely placed to provide practical and commercial tax solutions for clients. He is also experienced in negotiating with the ATO in relation to tax disputes and has conducted tax litigation in the Administrative Appeals Tribunal, Federal Court, High Court and State Courts.

Adrian "the Taxinator" Cartland has practiced for nearly 20 years, working at a number of tax law roles in top tier firms as well as boutique tax practices, meeting his billable targets on at least a few occasions. About ten years ago he began thinking about the future of law and developed an interest in legal Artificial Intelligence, mostly in an effort to find a robot to do the work he was too lazy to do. Deciding that it was best to pursue this expensive and time consuming hobby (er, business) while not on someone else's timesheet he founded his own firm Cartland Law, and is now unemployable. Because Adrian knows

Presenters

very little about other, more normal, areas of law, Cartland Law specialises in and only accepts instruction in tax, trusts and technology. Coming from a family of engineers who have constructed many things beneficial to society, Adrian has instead created a number of tax and trust structures that are so complex no-one really knows what they do. He has also created Ailira, the Artificially Intelligent Legal Information Research Assistant and partly contributed to the doom of humanity by AI. He is the Chair of the Society of Trust and Estate Practitioners SA, the TTI's State Taxes Committee, was Australia's funniest lawyer in 2007 and holds the Australian record for fastest MMA knockout at 6 seconds.

Joanne Casburn, FTI, is Special Counsel at Cooper Grace Ward Lawyers, specialising in tax dispute resolution and litigation, including recent disputes involving trust issues such as section 100A, section 99B and Part IVA. She has over 30 years of experience, with 10 years as a former ATO Assistant Commissioner. In the ATO, Joanne who was responsible for the leadership of the private wealth audit teams in Queensland including Part IVA matters that have recently been decided in the Federal Court. Joanne was recognised in 2020 as a finalist in The Tax Institute's

SME Tax Adviser of the year awards. She is also a State Councillor for the Queensland Branch of The Tax Institute.

Patrick Ellwood, is a lawyer with almost two decades of experience assisting high net worth individuals and family business owners with their tax, estate planning and asset protection needs. He has acted for a wide variety of family businesses, farming families, entrepreneurs and startup businesses, located across Australia. He is a regular speaker for a range of private and professional bodies and is a published author of a number of legal textbooks. He has presented for organisations including the Taxation Institute of Australia, Institute of Public Accountants and Queensland Law Society. Patrick is passionate about helping business owners grow their business and ultimately achieve maximum value upon their retirement. Patrick is listed in the prestigious Doyle's Guide as a recommended Wills, Estates & Succession Planning lawyer and appears in the 'Best Lawyers' guide for Trusts and Estates and Wealth Management/ Succession Planning.

Fletcher Heinemann, CTA, is a principal at HLS Tax Law who specialises in helping clients and their advisers with

tax and customs issues. Fletcher has a particular interest in helping clients navigate ATO reviews and audits. Fletcher and his team help clients with advice, private rulings, objections and litigation. Fletcher has also presented sessions at The Tax Institute's Queensland seminars and national conferences and has published papers on topical tax and customs issues.

Laura Hanrahan works with families to provide tailored personal and business succession solutions. Her tailored succession planning includes drafting complex wills, testamentary trusts, enduring powers of attorney, discretionary trusts, self managed superannuation trusts, binding death benefit nominations and deeds of family arrangement. Laura also has a particular focus on self managed superannuation funds. Including the establishment of SMSFs and other compliant SMSF investment structures, compliance advice and death benefit planning and payment. Every family is different and Laura enjoys using her creativity to help clients create a succession plan which works for them.

John Ioannou, CTA, was admitted as a Solicitor in 2002, is a Principal Lawyer at Macpherson Kelley and leads the national tax practice. He has experience

in the areas of tax structuring, tax disputes and commercial transactions. John has a Bachelor of Arts, Bachelor of Laws and a Masters of Law.

Sarah Lancaster is a principal at HLS Tax Law. She advises and represents taxpayers in a wide range of tax disputes, including those involving the ATO and State Revenue authorities. Her technical expertise covers various areas such as income tax, international tax, GST, payroll tax, stamp duty, and customs duty.

Bryan Mitchell, FTI, is the managing director of Mitchells Solicitors. He is an Accredited Specialist in Succession Law and a full member of the Society of Trust & Estate Practitioners ("STEP"). Bryan & his firm are recognised leaders in Estate Planning and Estate Litigation in Australia. His practice works exclusively in the areas of Wills, Estates, Trusts & Elder Law. Bryan is a regular presenter. He is the recipient of the STEP Australia Masters Award 2023; Australasian representative on the worldwide council of STEP; past Chair of STEP Australia; former Chair of STEP Queensland; Deputy Chair for the Queensland Law Society ("QLS") Succession Law Policy Committee; Chair of the QLS Succession Law Specialist Accreditation Advisory Committee; and member of the University of Queensland Law School Advisory Board.

Presenters

Sally Preston, CTA, is a partner of Smart Solutions Tax and Business Advisory. Sally has an extensive compliance and advisory background, specialising in tax consulting and transaction advisory. With a diverse career background, Sally has worked across various industries and offers a wide range of services to both small and large organisations. These services have included tax advisory, compliance, complex group structures including structuring for listed inbound and privately owned businesses, and assistance with ATO and Revenue office audits.

Melinda Ranson is a special counsel in the private client team at Cooper Grace Ward. Her areas of expertise include succession law, trusts and dispute resolution. Melinda has extensive experience in estate planning for large family groups, taking a holistic approach to all structures (companies, trusts and superannuation) to ensure it is not only the client's personal assets that will pass as desired, but all structures will follow. Having also acted in estate disputes, Melinda brings experience from the point of view of when an estate plan 'goes wrong'.

Nathan Yii, CTA, is the Principal Lawyer, a Chartered Tax Adviser and an accredited SMSF Specialist Advisor™

of the Melbourne-based legal practice, Nathan Yii Lawyers. He is a graduate of Melbourne Law School and holds a Bachelor of Commerce (Accounting), a Bachelor of Laws (Hons) and a Master of Laws. Nathan is recognised in Doyle's Guide as a leading lawyer – a Preeminent Wills, Estates & Succession Planning Lawyer and a Recommended Wills & Estates Litigation Lawyer in Victoria. Nathan takes a strategic approach to legal practice and focuses on tax-effective solutions, estate planning, asset protection, SMSF compliance and trusts, estates and SMSF disputes. He works with and consults to high net worth individuals, family offices, legal and non-legal professionals and their clients. Nathan is a regular presenter in his areas of interest and expertise, and regularly presents for organisations and practitioner discussion groups throughout Australia. He is also an adjunct lecturer and advisory committee board member for the Estate Planning Practice specialisation in the Master of Laws program at the College of Law. Nathan was awarded The Tax Institute's national Dux Award for CTA3 Advisory and the Justice Graham Hill Scholarship in 2017.



Venue and accommodation



The Calile Hotel

48 James Street, Fortitude Valley, QLD 4006

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

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

Getting to The Calile Hotel

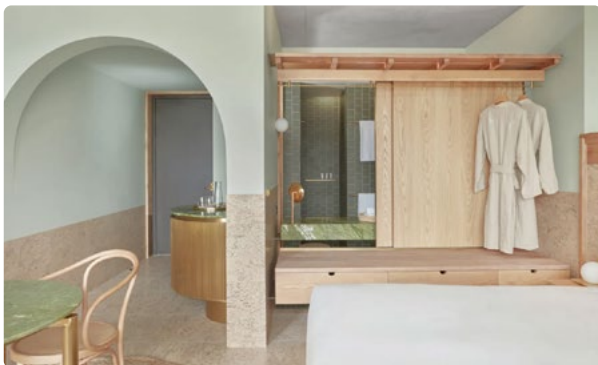
The resort is located at 48 James Street, Fortitude Valley and is approximately a 20 minute drive from the Brisbane Airport. The hotel is located a short ten-minute walk from the Fortitude Valley Train Station and is directly adjacent of the James Street 8A bus stop.

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

Accommodation

Favourable room rates have been secured at The Calile Hotel, 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

Networking function | Thursday, 23 October 2025

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

Registration inclusions

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

Confirmation of registration

Please note you will receive two separate emails in the form of a tax invoice at the time of payment and a confirmation email at registration completion.

Continuing Professional Development (CPD)

Attendance at the 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 conference including the networking function.

Networking

Networking function – Calile Hotel

A networking function will be held at the Calile Hotel on Thursday evening directly after the last session of the day. The networking function is included in the conference registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$80. Please indicate your requirements, including dietary requirements, at the time of registration.

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control, including "an act of god", "pandemic", "health-related event" or "government requirements", we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event. It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee. The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays. The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

Privacy

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

Enquiries

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

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

Registration

Registration inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ 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 functions can be purchased on the registration form

Discounts

Early bird registration

All registrations received and paid on or before Friday, 19 September 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.

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
Early bird registration Register on or before Friday, 19 September 2025	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$2,090	<input type="checkbox"/> \$1,995
Standard registration Register after Friday, 19 September 2025	<input type="checkbox"/> \$1,895	<input type="checkbox"/> \$2,290	<input type="checkbox"/> \$2,195

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

Networking Function

The Networking Function is INCLUDED in the registration fee for delegates attending the full conference.

Thursday: 23 October 2025 – The Calile Hotel

- ☐ Yes, I WILL be attending the Networking function OR
- ☐ No, I WILL NOT be attending the Networking function
- ☐ Yes, I require additional tickets for the Networking function at \$80 per person

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

Dietary requirements:

2 Delegate contact details

Member no.:

If your member details are up-to-date, you can skip this section.

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

☐ Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking

*Become a member and save!

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

- save over \$230 on Affiliate membership on 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 TODAY

3 Payment summary

Registration fees

\$

Additional guest tickets – Networking Function (\$80 each)

\$

Total payable

\$

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

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:

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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