

SA Tax Forum

3-4 April 2025

Pullman Adelaide

12 CPD hours



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

Caitlin Ashworth, CTA, CCK Lawyers (Co-Chair)
Josh Pascale, Cowell Clarke (Co-Chair)
Timothy Stokes, FTI, HWL Ebsworth Lawyers
Lisa Pritchard, CTA, Holman Hodge
Malcolm Oakley, CTA, Australian Taxation Office

Proudly supported by:



Welcome

On behalf of the organising committee and The Tax Institute, it is our pleasure to invite you to the SA Tax Forum on 3-4 April 2025.

The SA Tax Forum is one of Adelaide's premier events for tax professionals and provides a great opportunity for you to connect with your peers and grow your tax network. With an outstanding line-up of local and interstate speakers who will present on a range of relevant and topical issues, the program offers delegates a fantastic forum to keep up to date with our changing tax landscape and gain technical knowledge as well as practical and commercial insights, all while earning valuable CPD points.

The 2025 program includes:

- Exceptional local and interstate speakers
- Panel and technical sessions with an emphasis on “real-world” application
- A mixture of plenary and concurrent sessions relevant for SME and corporate tax professionals
- Opportunities to network and exchange ideas with peers and tax experts.

The SA Tax Forum Program Committee wishes to take this opportunity to thank all our speakers, all of whom have generously agreed to volunteer their time to share with you their knowledge and insights.

Don't miss your chance to be part of the 2025 SA Tax Forum! We look forward to seeing you there.



A handwritten signature in black ink, appearing to read 'Caitlin Ashworth'.

Caitlin Ashworth, CTA
Co-Chair, Forum Organising
Committee



A handwritten signature in black ink, appearing to read 'J. Pascale'.

Joshua Pascale
Co-Chair, Forum Organising
Committee

Early bird pricing offer
Register on or before 7 March 2025 to save!

Technical program

Day 1 Thursday, 3 April 2025

Time ACDT	Session
8:00 – 8:45am	Registration
8:45 – 9:00am	Welcome and President’s address Speaker: Josh Pascale, Co-Chair, Forum Organising Committee, Tim Sandow, CTA, President, The Tax Institute
9:00 – 9:30am	Session 1: VIP keynote address Speaker: The Hon. Stephen Mullighan MP
9:30 – 10:30am	Session 2: Tainted gains – SMSF, NALI/NALE and other issues Speaker: Stephen Heath, CTA (Life), Wallmans This session will provide an in-depth exploration of recent developments in Non-Arm’s Length Income (NALI) and Non-Arm’s Length Expenditure (NALE) provisions, focusing on their practical implications for superannuation funds. Key topics include: <ul style="list-style-type: none">• Overview of TD 2024/5, previous industry approaches, and insights from LCR 2021/2• Interaction between NALI and CGT provisions and tainting of arm’s length capital gains (Example 3 in TD 2024/5)• Use of capital losses to offset tainted gains and issues with wash sales• Tainted gains arising from the provision of non-trustee type services (Example 9 in LCR 2021/2); and• Changes in ATO’s approach between TR 2010/1 and TR 2010/1-DC in relation to NALE and contributions and the ATO’s prevailing view.
10:30 – 11:00am	Morning tea
11:00am – 12:00pm	Session 3: Panel session – The current state of play with TASA and TPB Panellists: Tim Sandow, CTA, The Tax Institute, Peter de Cure AM, Tax Practitioners Board Facilitator: Lisa Pritchard, CTA, Holman Hodges Substantial changes have recently been made to the Tax Agent Services (Code of Professional Conduct) Determination 2024 (Determination) as a result of extensive advocacy efforts by The Tax Institute and other professional associations (Joint Bodies). While the changes to the Determination broadly address the key concerns raised by the Joint Bodies, the latest round of changes still adds a considerable compliance burden and a range of uncertainties for all registered tax practitioners. This expert panel will discuss the latest changes to help you navigate your new obligations. The panel will also consider the International Ethical Standards Board for Accountants (IESBA) new global standard on ethical considerations in tax planning and related services which applies from 1 July 2025. The session will cover: <ul style="list-style-type: none">• The latest changes to your Code of Professional Conduct obligations• When the changes apply• How practitioners can comply with their new obligations• How the Tax Practitioners Board, as regulator, will administer the new law; and• The focus of Tax and Ethics at a global level. This session will be a ‘closed room’ session and will not be recorded.

Technical program

Day 1 Thursday, 3 April 2025 continued

Time ACDT	Session		
12:00-1:00pm	<p>Session 4: A closer look at the small business CGT concessions Speaker: Adam Dimac, Hall & Wilcox</p> <p>This session will explore essential aspects of the Small Business CGT Concessions. Topics covered will include:</p> <ul style="list-style-type: none">• Addressing common issues with the connected with/affiliate tests• Maximum net asset value test – what is a liability and when is it related to an asset?• Diving deeper into passively held assets; and• Structuring into the concessions – managing Part IVA issues.		
1:00-2:00pm	Lunch		
2:00-3:00pm	<table border="0"><tr><td><p>Session 5A: ATO private groups tax performance programs – Next 5,000 and medium & emerging Speaker: David Hall, Australian Taxation Office</p><p>This session will cover:</p><ul style="list-style-type: none">• Understanding the ATO private groups tax performance programs• Next 5,000 program:<ul style="list-style-type: none">• Insights so far• Current priority focus areas• Expectations for effective tax governance.• Medium & Emerging (M&E) program:<ul style="list-style-type: none">• M&E population• Program strategy & intent• Compliance risks in focus.• Preparing for and navigating ATO reviews.</td><td><p>Session 5B: Super & SMSFs – Where are the goal posts? Speaker: Shirley Schaefer, BDO</p><p>Superannuation and the rules that apply to Self Managed Superannuation Funds in particular seem to be a constantly moving target.</p><p>It can be difficult to know what are the current rules and current focuses of the ATO in this area of tax law.</p><p>This session will provide insight into the current state of play with superannuation & SMSFs and what you and your clients should be focussing on in 2025.</p></td></tr></table>	<p>Session 5A: ATO private groups tax performance programs – Next 5,000 and medium & emerging Speaker: David Hall, Australian Taxation Office</p> <p>This session will cover:</p> <ul style="list-style-type: none">• Understanding the ATO private groups tax performance programs• Next 5,000 program:<ul style="list-style-type: none">• Insights so far• Current priority focus areas• Expectations for effective tax governance.• Medium & Emerging (M&E) program:<ul style="list-style-type: none">• M&E population• Program strategy & intent• Compliance risks in focus.• Preparing for and navigating ATO reviews.	<p>Session 5B: Super & SMSFs – Where are the goal posts? Speaker: Shirley Schaefer, BDO</p> <p>Superannuation and the rules that apply to Self Managed Superannuation Funds in particular seem to be a constantly moving target.</p> <p>It can be difficult to know what are the current rules and current focuses of the ATO in this area of tax law.</p> <p>This session will provide insight into the current state of play with superannuation & SMSFs and what you and your clients should be focussing on in 2025.</p>
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Technical program

Day 1 Thursday, 3 April 2025 *continued*

Time ACDT

Session

3:00-3:30pm

Afternoon tea

3:30-4:30pm

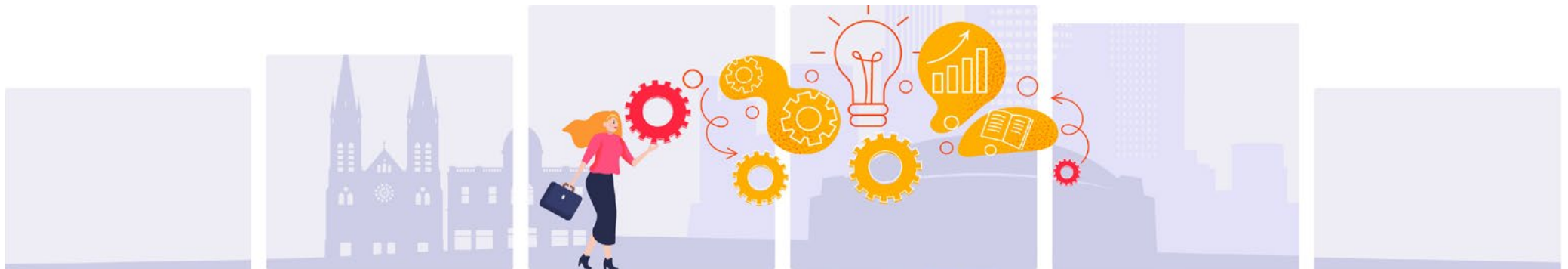
Session 6: Depreciating assets – Transactional tips and traps

Speaker: Jackson Jury, Cowell Clarke

This session will consider some of the common but challenging transactional issues that can arise when dealing with depreciating assets, having particular regard to the culmination of assets that have been subject to the temporary full expensing and instant asset write-off measures. The session will also present various planning tips for advisers when addressing these issues.

Topics covered in this session will include:

- Balancing adjustments and the ticking time bomb
- Price allocation issues for depreciating assets upon sale
- “Double shuffle” dilemmas with pooled assets; and
- What to consider for leased depreciating assets.



Technical program

Day 1 Thursday, 3 April 2025 continued

Time ACDT	Session
4:30 – 5:30pm	<p>Session 7: Alcohol taxation in Australia – A tour of the different regimes Speaker: Jessica Pengelly, CTA, HWL Ebsworth Lawyers</p> <p>This session provides attendees with a taste of the alcohol taxation regime in Australia, with an overview of the wine equalisation tax (WET), excise and customs duty legislative schemes that apply to different types of alcohol.</p> <p>Topics covered include:</p> <ul style="list-style-type: none">• Overview of the legislative schemes• Product classification issues• Rebates and concessions available to producers; and• Areas of ATO focus.
From 5:30pm	Networking event



Networking Function

After a full day of technical toil, join your colleagues and forum speakers for an evening of drinks, grazing platters and networking.

Date: Thursday, 3 April 2025

Time: From 5:30pm

Venue: Pullman Adelaide

Price: Inclusive for all full registration
Additional tickets are \$80 each – see registration form for details

Dress: Business or business casual

Technical program

Day 2 Friday, 4 April 2025

Time ACDT	Session
8:15 – 8:45am	Registration
8:45-9:30am	<p>Session 8: Monetary easing in an election year – Navigating the investment environment in an uncertain interest rate environment</p> <p>Speaker: Tim Clark, Morgan Stanley</p> <p>In this session Tim will examine the forces making the timing of the rate cut increasingly uncertain, from sticky services inflation, wage productivity and fiscal spend that is limiting the ability to ease monetary policy. Against this backdrop, what is the potential for the South Australian economy to continue to outperform given important structural differences?</p> <p>Longer term, potential tariffs in the US, a restrictive immigration in 2H25 may initially be inflationary, but for what consequences to growth? This will have important consequences for investment portfolio, and Tim will provide key insights into how he is positioning client portfolio ahead of emerging mega trends including longevity, deglobalization and tech innovation.</p>
9:30 – 10:30am	<p>Session 9: Payday super</p> <p>Speakers: Jacqui Tucker, CTA, KPMG</p> <p>Payday Super is just around the corner – 1 July 2026 is really not far away, and employers will need to plan well to be ready. As advisers you can help your clients with that journey. This session aims to equip you with the necessary knowledge to do so. The Treasurer has released a fact sheet outlining the policy design details. Matters to be covered include:</p> <ul style="list-style-type: none">• When must the contribution be paid and received• What does the new superannuation guarantee charge look like• What is the ATO and the super industry doing to prepare; and• What should be done now to prepare for implementation.
10:30 – 11:00am	Morning tea
11:00am – 12:00pm	<p>Session 10: Navigating disputes involving discretionary trusts</p> <p>Speaker: Sam Ure, FTI, South Australian Bar</p> <p>In this session, we will examine some of the issues that discretionary trusts can raise in the context of disputes. We will look at beneficiaries' rights of access to information, trustees' prospects of indemnity for costs, the power of appointors, powers of amendment and challenges to the exercise of powers by trustees.</p>

Technical program

Day 2 Friday, 4 April 2025 continued

Time ACDT	Session
12:00–1:00pm	<p>Session 11: Walking the tightrope – Anti-Avoidance traps for corporate restructures in preparation for sale Speaker: Briony Hutchens, CTA, Finlayson</p> <p>Explore the key anti-avoidance challenges in corporate restructures before a sale. This session offers valuable strategies and practical guidance for tax professionals assisting clients with corporate sales and restructures. Briony Hutcheson will provide practical insights on:</p> <ul style="list-style-type: none">• Managing risks in extracting value, including dividend stripping and streaming issues• Navigating new capital raising anti-avoidance measures; and• Mitigating risks to ensure smooth and compliant transactions.
1:00–2:00pm	Lunch
2:00–3:00pm	<p>Session 12: Challenging the conclusions of the South Australian Commissioner Speaker: Lee Jurga, Perks</p> <p>This session will cover the strategies and approaches available for challenging assessments and decisions made by the SA Commissioner, providing delegates with a practical toolkit for navigating disputes effectively.</p> <p>Topics covered include:</p> <ul style="list-style-type: none">• The different paths available for challenging decisions, from informal inquiries to formal dispute resolution processes• The various negotiation techniques and how to determine when to use informal or formal strategies for addressing disputes• If time permits, common disputes will also be explored, including how variables such as ‘the relevant tax head under consideration’ and the ‘branch of RevenueSA being engaged’ may alter your dispute strategy.
3:00–4:00pm	<p>Session 13: Taxation of image rights Speakers: Elma Li, WRP Legal & Advisory, Nick McCann, WRP Legal & Advisory</p> <p>As athletes, entertainers, and social media influencers grow in influence, so too does the complexity surrounding the ownership and taxation of their image rights. This session delves into the fundamentals and evolution of image rights under Australian intellectual property law. This session will explore the benefits of establishing an image rights structure and contrasting Australia’s approach with international practices. Key topics include:</p> <ul style="list-style-type: none">• Taxation of image rights in Australia, including historical context and international comparisons• Benefits of image rights structures and similar intellectual property rights• Tax implications of other intellectual property protections; and• Cross-border challenges in commercial and tax contexts.
4:00pm	Closing address and afternoon tea

Presenters

Tim Clark has 17 years of experience in portfolio management, equity research and investment banking in Australian and international markets. In 2019, Tim joined Morgan Stanley in Adelaide as a portfolio manager and investment adviser to family offices across Australia. Tim has had a truly global career having worked and lived in Sydney and Boston for Massachusetts Financial Services (MassFi) and visited more than 30 global cities to research companies. Tim's primary responsibility at MassFi was researching and recommending global consumer and industrial companies for portfolios with funds under management in excess of US\$500bn. He has travelled extensively across North America, Europe, China, India and Japan to research companies. He combines his experience with the depth of research resources at Morgan Stanley to develop bespoke portfolio for his private clients.

Peter de Cure AM is the Chair of The Practitioners Board. He is a professional non-executive director. His experience in tax matters has developed over a 25-year career as a tax partner with KPMG, and as a registered tax agent for 16 years. Peter is a Fellow of the Australian Institute of Company Directors and a Fellow of Chartered Accountants Australia and New Zealand. He is Chairman of the Royal

Flying Doctor Service SA & NT, Chairman of Wirra Wirra Vineyards, Chairman of Accord Property Holdings Pty Ltd and the Accord Property Development Fund, a Director of PMB Defence Pty Ltd and Presiding Officer of the South Australian Fire & Emergency Commission, a Director of Variety the Children's Charity SA, and advisory board Chairman of Tim Adams Wines.

Adam Dimac is an experienced tax lawyer, and advises clients on a range of matters including tax planning and structuring, Division 7A, the small business CGT concessions, corporate restructuring, professional firm structures, trust taxation, the taxation of settlements and cryptocurrency taxation. Adam regularly acts for taxpayers in dispute and controversy matters, and provides assistance with ATO reviews and audits.

David Hall is an Assistant Commissioner at the ATO leading the Private Wealth Engagement and Assurance Services teams in SA and WA who undertake engagements within the Top 500, Next 5,000 and Commercial Deals programs. David has responsibility for leading the national Medium & Emerging private groups tax performance program and he has a detailed understanding of the ATO's Tax Avoidance Taskforce work programs relevant for private businesses. David

has over 15 years' experience at the ATO across a variety of compliance, technical advice, risk management and program strategy leadership roles.

Stephen Heath, CTA (Life), is a Partner in the Taxation & Revenue section of Wallmans Lawyers, with his principal practice areas being superannuation and tax. He also works on general commercial matters with a focus on tax planning, business structuring and insurance. Steve is a recent past member of The Tax Institute's State Council and National Council.

Briony Hutchens, CTA, is a Partner at Finlaysons, acting on behalf of a wide range of clients on matters ranging from one-off, large and complex matters to those encountered on a daily basis. She advises on most areas of state and federal taxes including business structuring issues; state taxes, including stamp duty, land tax and payroll tax; taxation disputes (state and federal); trusts; self-managed superannuation funds; property and joint venture projects; estate and succession planning and all aspects of commercial transactions. Briony is a Chartered Tax Adviser and holds a Master of Taxation (UNSW). She is recognised in Best Lawyers Australia for her expertise in both Wealth Management & Succession Planning and Trusts &

Estates, and was awarded Lawyer of the Year by Best Lawyers Australia for Wealth Management & Succession Planning in both 2022 and 2024. She is also recognised in Doyle's Guide as one of SA's leading tax lawyers.

Lee Jurga is an Associate Director in the Tax Consulting Team at Perks in Adelaide. He has 17 years of both private and public sector experience advising on State and Federal taxation issues. He currently advises SME clients and high net worth individuals on a range of taxation issues and tax effective restructuring and succession strategies from both a State and Federal tax perspective.

Jackson Jury is an Associate in Cowell Clarke's Tax & Revenue and Superannuation practice groups. Jackson acts for a range of clients in a number of sectors including property sale and development, private clients, agribusiness, not-for-profits and tech start-ups. Jackson's areas of expertise include all Federal and State taxation law including income tax, capital gains tax, GST, land tax, stamp duty and payroll tax. Jackson has also developed a particular interest in a number of specialty areas including the various state-based land tax regimes across Australia and tax concessions relating to tech start-ups and their investors.

Presenters

Elma Li is a Lawyer at WRP Legal & Advisory. Since joining WRP Legal & Advisory, she has gained valuable experience in a diverse range of intellectual property matters, including trade mark, copyright, confidential information, privacy, Australian Consumer Law and technology matters. Elma assists clients with a wide range of issues, including trade mark and copyright registration, IP enforcement and data privacy. She is especially passionate about helping startups, tech firms, and creative professionals safeguard their assets and navigate complex regulatory landscapes. Drawing on her Chinese background, Elma frequently collaborates with Chinese clients, providing bilingual legal support tailored to their specific needs in the Australian market. Elma is a member of the Law Society of South Australia and the Australian Asian Lawyers Association, and she is also recognised as a Highly Commended – Rising Star Alumni by StudyAdelaide in 2024, for her outstanding achievements as an international graduate in South Australia. Elma is also an accomplished advocate for innovation and creativity, as she has founded the podcast ‘Law on your Lounge,’ available on Spotify, through which she dissects intellectual property and commercial law, providing a fun and accessible resource for entrepreneurs,

professional advisors, and the general public.

Nicholas McCann is a Senior Associate at WRP Legal & Advisory. He has a Bachelor of Laws (Honours) and a Bachelor of Commerce (Honours), majoring in Accounting, from the University of Adelaide. Nicholas has extensive experience in taxation advisory as well as tax dispute resolution and lodging submissions with federal and state revenue authorities. Nicholas regularly advises on commercial transactions, in particular taxation planning and structuring, asset acquisitions and disposals, taxation compliance, not-for-profit organisations, restructures and transactional advice. Nicholas works with senior and junior practitioners and other professional advisors to provide advice on a wide range of corporate, commercial and taxation issues (at both federal and state level), to a broad range of clients including private high-net-worth individuals, family groups, large companies (including ASX listed companies) and not-for-profit organisations. Nicholas is also a member of the Law Society of South Australia and the Golden Key International Honour Society (Law and Commerce). In addition to his role at WRP Legal & Advisory, Nicholas tutors Financial Accounting in the Adelaide University Business School.

The Hon. Stephen Mullighan MP was appointed Minister for Police in January 2025, Defence and Space Industries in April 2024 and appointed Treasurer in the Labor Government in March 2022. Stephen was first elected as the Member for Lee in the South Australian Parliament in 2014. In 2014, he was appointed the Minister for Transport & Infrastructure, and in 2016 added the portfolios of Housing and Urban Development. Prior to entering the Parliament, Stephen led Deloitte’s economics team in Adelaide between 2010-2013 providing economic advice to corporate clients, the non-profit sector and state and federal governments. Stephen is a proud western suburb resident, is married to Antonia and they have three children Benjamin, Isaac and Olivia.

Jessica Pengelly, CTA, is a Special Counsel in HWL Ebsworth’s Tax Group in Adelaide. Jessica has 15 years’ experience in tax and revenue law, and practices across a broad range of taxation and revenue law areas including income tax, GST, alcohol taxation including WET and excise, stamp duty, payroll tax and land tax. Prior to joining HWL Ebsworth, Jessica worked for the ATO and was part of the ATO’s Tax Counsel Network, specialising in international tax and GST, with a sub focus on the GST treatment of food and beverages. Due to

her background, Jessica has a particular interest in food and beverage taxation and labelling, and has extensive experience in advising clients in the wine, spirits and beer industries.

Lisa Pritchard, CTA, is a Partner with Holman Hodge, advising on many levels of taxation and accounting, ranging from small start-up enterprises to reporting to boards of publicly listed corporations. Lisa now works predominantly on small to medium enterprises in the Adelaide market with a specific focus on tax planning, structuring, capital gains tax and compliance work for businesses across many industries.

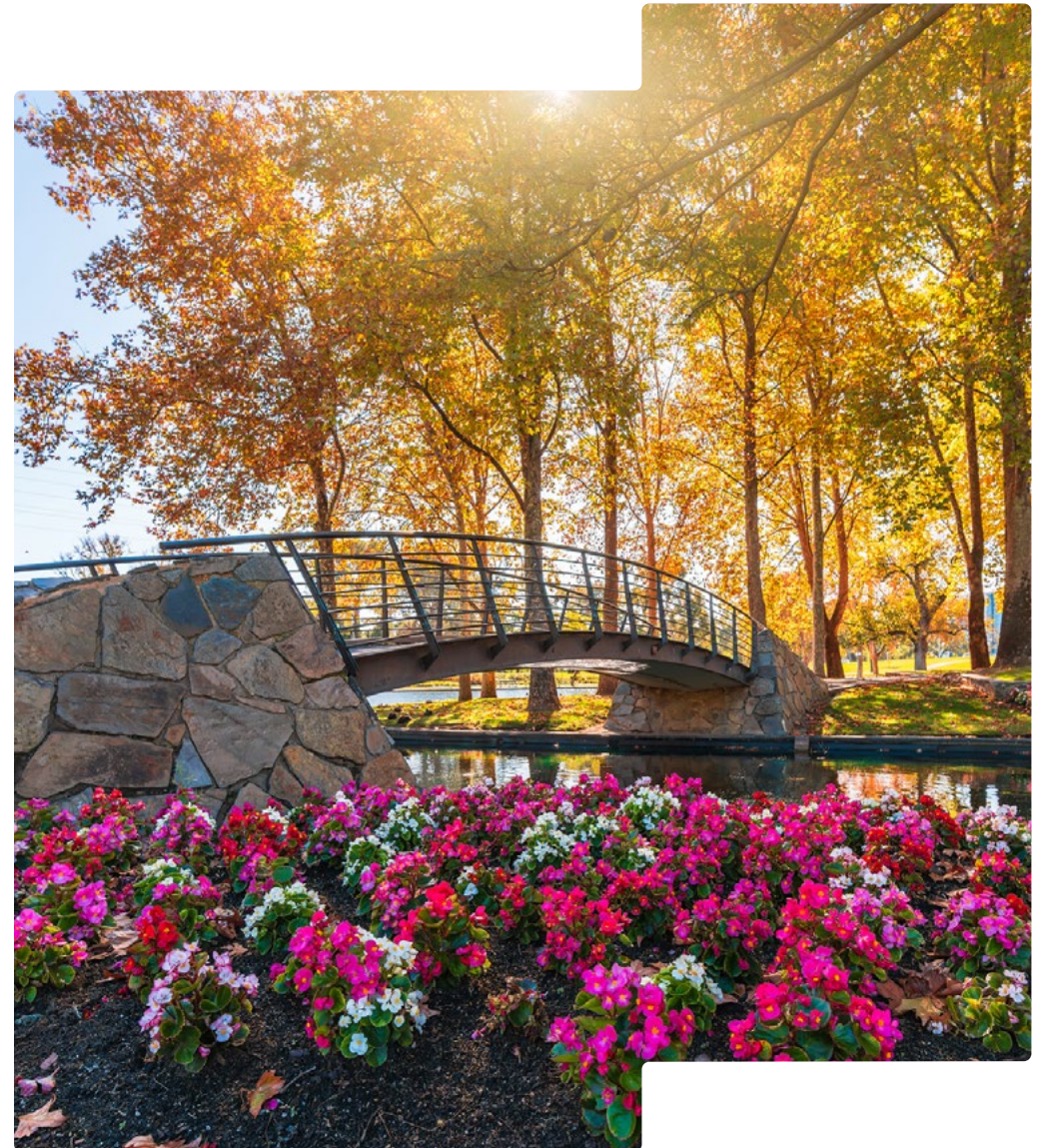
Tim Sandow, CTA, has over 30 years of experience as a tax professional, including 25 years in the Big 4. He provides income tax related advice to a variety of private and large public companies as well as multi-nationals. He has advised on mergers & acquisitions, tax governance, corporate tax, international tax, and employment tax issues. Tim is also the Partner leading BDO’s National Tax Risk & Ethics group. Tim is the President of The Tax Institute for 2025 and is the SA representative on the National Board of The Tax Institute. He is a CTA of The Tax Institute and a Chartered Accountant Fellow.

Presenters

Shirley Schaefer is one of the Superannuation leaders at BDO, an auditor by training and a SMSF expert by choice. Shirley's passion for all things super is well known. She has been working in the super space for over 25 years and is an expert in all things SMSF. Shirley is a regular speaker at superannuation, SMSF and Audit conferences. She provides SMSF competency training for accountants and auditors and is the co-author of the Thomson Reuters SMSF Audit Guide.

Jacqui Tucker, CTA, is the Head of Employment Taxes & Reward, KPMG Enterprise – that part of the KPMG practice which focuses on the mid-market. She has substantial experience advising a wide range of clients on expatriate and employment taxes. Jacqui advises extensively on employer obligations including FBT, payroll tax and superannuation, with a focus on policy, process improvement, and cost savings. She has wide experience in the design and implementation of equity based compensation for employers with wide and varying attributes, including consideration of global equity schemes. In recent years, she has focused on private, start-up and high growth businesses.

Sam Ure, FTI, is a barrister practising in tax, trusts and superannuation. Sam has appeared in numerous State and Federal tax cases. He has advised both taxpayers and revenue authorities in many reviews and audits. Sam also practises in commercial disputes, administrative law and regulatory proceedings.



Venue and accommodation



Pullman Adelaide

16 Hindmarsh Square, 5000 Adelaide

Adelaide's premium 5-star hotel positioned in the heart of the Adelaide CBD. Located on Hindmarsh Square, you are only a short walk from many attractions, including Rundle Street's fashion boutiques and lively café culture, Adelaide Oval, National Wine Centre and a pleasant 20 minute journey takes you to the Adelaide Hills Wine region. It is a pleasant 45-minute drive to the Barossa Valley and McLaren Vale.

Getting there

The Pullman Adelaide is approximately 7 km and a 19 minutes drive from Adelaide airport. Delegates can take advantage of a plethora of travel options, including bus, taxi or private car.

To find the best route from your location please [click here](#).

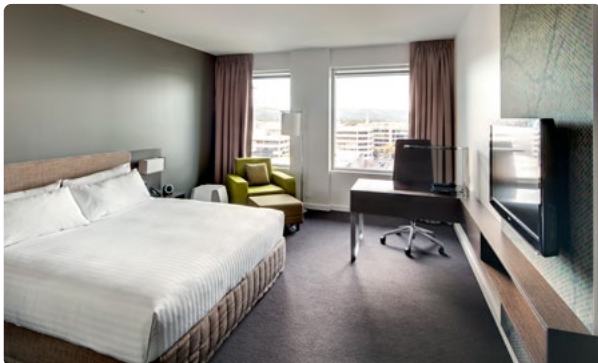
Parking

For secure parking, the hotel offer valet parking in an undercover car park with a height restriction of 2.1 meters for \$55 per 24-hours. Alternatively, prepaid self-parking is available in a nearby undercover car park with a height restriction of 1.9 meters for \$33 per 24-hours with unlimited entry and exits. If your vehicle exceeds 2.5 meters in height, please contact our concierge for alternative parking options.

Accommodation

Favourable room rates have been negotiated and secured at Pullman Adelaide. To book please follow the link, [here](#).

* Please note that as per hotel booking conditions, all accommodation booked is non-refundable. All additional hotel incidentals, including breakfast, remain the responsibility of delegates, and individuals will be responsible for payment of the balance of their account when checking out of the hotel. Please note that extra charges may be incurred for additional guests and will be charged to individual room accounts upon checkout. Rates subject to change based on availability at time of booking.



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 forum.

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

Networking function

A networking function will be held directly following the last session on Thursday from 5.30pm at the Pre-Function area. The networking function is included in the

forum 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.

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/ forum lunches	Forum networking function*
Full registration This registration option entitles one delegate to attend the entire event.	✓✓✓	✓✓✓	✓✓✓
Employer registration This registration option allows one registration to be shared between multiple attendees from the same firm.	✓✓✓		

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

Discounts

Early bird registration

All registrations received and paid on or before 7 March 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 15 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before 7 March 2025	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$2,085	<input type="checkbox"/> \$1,995
Standard registration Register after 7 March 2025	<input type="checkbox"/> \$1,895	<input type="checkbox"/> \$2,285	<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 forum.

Thursday, 3 April 2025 at the Pullman Adelaide

- 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:

*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 TODAY

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

3 Breakout session options

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

Day One – Thursday, 3 April 2025

- 2:00–3:00pm Session 5A: ATO private groups tax performance programs – Next 5,000 and Medium & Emerging
- Session 5B: Super & SMSFs – Where are the goal posts?

4 Payment summary

Registration fees \$

Additional guest tickets – Networking function (\$80) \$

Total payable \$

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

5 Payment method

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

- Cheque payable to The Tax Institute** (in Australian dollars)
- Credit card** Card type: AMEX Visa MasterCard Diners

Name on card:

Card no.: Expiry date:

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

Collection notice: The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

To register

Email customeradmin@taxinstitute.com.au

Mail Level 21, 60 Margaret Street, Sydney NSW 2000

Online taxinstitute.com.au

A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

1 Employer Ticket types

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

	Classic	Plus	Premium	Tailored
Early bird on or before 7 March	\$3,250	\$4,750	\$6,250	
Standard after 7 March	\$3,450	\$4,950	\$6,450	
Best for	SME	Mid-Tier	Corporate	Large/National
Flexibility	Your choice of 20 sessions	Your choice of 40 sessions	Your choice of 60 sessions	Contact us to tailor a quote today for you and your team to attend multiple events.
Team attendance	Up to 5 attendees	Up to 10 attendees	Up to 15 attendees	
Session formats	Face-to-face	Face-to-face	Face-to-face	
Networking	2 networking passes	5 networking passes	10 networking passes	

All Employer Ticket attendees receive:

- Electronic access to download available technical papers and presentations
- Morning tea, lunch and afternoon refreshments
- CPD hours allocated according to attendee

1 session = 1 CPD hour per attendee

Session selection

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

1 Employer Ticket types

Promotional code:

Ticket type	Cost	No. of tickets	Sub-total
<input type="checkbox"/> Classic			
<input type="checkbox"/> Plus			
<input type="checkbox"/> Premium			
Total payable \$			

2 Delegate contact details

Member no.: If your member details are up-to-date, you can skip this section.

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First name:

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Position:

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Address:

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