

# State Taxes Convention

**30 July – 1 August 2025**

**Grand Chancellor Hobart**

**12 CPD hours**



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

Paul Broderick, CEO & Commissioner of State Revenue (Co-Chair, State Taxes Convention Organising Committee)

Jodie Fogale, EY (Co-Chair, State Taxes Convention Organising Committee)

Duncan Bedford, ATI, McCullough Robertson

Adrian Chek, CTA, Allens

Jade DeBono, State Revenue Office Victoria

Rosemarie Gastaldello, Queensland Revenue Office, Queensland Treasury

Bernard Goh, State Revenue Office Tasmania

Richard Jolly, Queensland Revenue Office, Queensland Treasury

Greg Kent, CTA, PwC

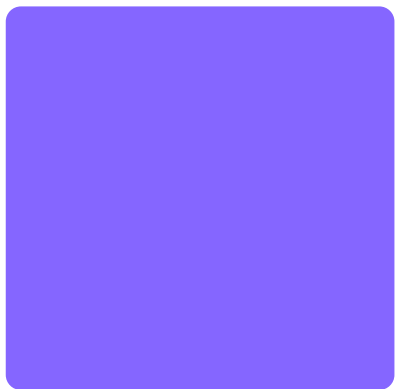
Jenny Lee, ATI, KPMG

Katie Lin, CTA, Nexia Australia

Rachel O'Donnell, CTA, O'Donnell Tax Law

James Petterson, ATI, Deloitte

Jessika Trifkovic, State Revenue Office Victoria



# Welcome

On behalf of the Convention Organising Committee, we are pleased to present the State Taxes Convention program, now in its 25th year, brought to you by The Tax Institute in conjunction with the Revenue Office in each state and territory.

The State Taxes Convention remains the only national convention covering all state and territory taxes in one technical program, with this year's convention taking place in Hobart.

As in previous years, all state and territory Revenue Commissioners will be in attendance, together with representatives from their respective offices. With strong attendance from both the private and government sectors, the convention has always been a popular forum for interaction and networking among participants in the state taxes community. It is particularly valuable for those with practices operating across multiple jurisdictions.

This excellent technical program has been pitched at a level that provides the general practitioner with a good understanding of current issues, although more technical topics are covered in depth for the tax specialists.

The program once again features the dual 'duties' and 'payroll tax' streams, including from a duties perspective, issues arising on renewables projects, the complex world of partnerships and stamp duty and the interaction between stamp duty and GST, and from a payroll tax perspective, issues relating to grouping and wage underpayments. We have also included sessions dealing with Artificial Intelligence, tax disputes and an economic update. As always, the convention materials will be a valuable research resource for years to come.

The Convention Organising Committee looks forward to welcoming you to Hobart this July!



A handwritten signature in black ink that reads "Paul Broderick".

**Paul Broderick, CEO and Commissioner, State Revenue Victoria**  
Co-Chair, State Taxes Convention Organising Committee



A handwritten signature in black ink that reads "Jodie".

**Jodie Fogale, EY**  
Co-Chair, State Taxes Convention Organising Committee

**Early bird pricing offer**  
**Register on or before Friday, 27 June 2025 to save!**

# Technical program

**Day 1**

Wednesday, 30 July 2025



## Welcome reception

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

This is the perfect way to reacquaint yourself with your old friends and new before diving into the technical sessions the next day. Enjoy light refreshments alongside colleagues, speakers, and State Revenue Officers.

**Date:** Wednesday, 30 July 2025

**Time:** 6:00–7:30pm

**Venue:** Franklin Wharf Restaurant & Bar

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

**Dress:** Casual

# Technical program

**Day 2**      Thursday, 31 July 2025

Time	Session
From 8:00am	Registration
8:45 – 9:00am	Welcome and President’s address Speakers: Paul Broderick, CEO and Commissioner, State Revenue Victoria, Tim Sandow, CTA, President, The Tax Institute
9:00 – 9:30am	Session 1: Commissioner’s address Speaker: Jonathon Root, Commissioner, State Revenue Office Tasmania
9:30 – 10:30am	Session 2: Economic update Speaker: Cedric Hodges, Deloitte
10:30 – 11:00am	Morning tea
11:00am – 12:00pm	Session 3: Conducting disputes Speakers: John Tan, State Revenue Office Victoria, Paula Thorne, State Revenue Office Victoria  A steady stream of state and territory tax cases flows through our tribunals and courts every year. These are only the tip of the iceberg of disputes that arise between taxpayers and the revenue authorities, most of which are resolved without litigation.  This session will focus on practical issues arising in the context of tax disputes, including: <ul style="list-style-type: none"><li>• The exercise of Commissioners’ discretions to not assess and the role of compromise assessments in settling disputes</li><li>• How often are disputes settled and how often do they proceed to court or a tribunal review? Are some cases run because the relevant Commissioner, in effect, needs a “test case” to resolve a contentious point of law</li><li>• What are the unique features and nuances of the legislation and cases in a state / territory tax dispute context</li><li>• What mistakes do taxpayers and their advisors make in the conduct of cases, and what frustrates the revenue offices about how some taxpayers / practitioners conduct disputes and vice versa; and</li><li>• Live examples of interesting anecdotes and stories from the courts / tribunals.</li></ul>

# Technical program

**Day 2** Thursday, 31 July 2025 continued

Time	Duties Stream	Payroll Tax Stream
12:00-1:00pm	<p><b>Session 4A: Land tax grouping</b> Speakers: Scott Lang, Allens, Craig Milner, CTA, Allens</p> <p>The land tax grouping rules in each jurisdiction vary surprisingly in their content and practical application.</p> <p>This session will examine the land tax grouping rules in each jurisdiction and in particular:</p> <ul style="list-style-type: none"><li>• Company grouping rules</li><li>• Trust grouping rules</li><li>• Interaction between trust and company grouping rules; and</li><li>• Application to common structures (e.g. corporate groups, different trustees, different trust terms, custodians, head trust-sub-trusts, and stapled structures).</li></ul>	<p><b>Session 4B: Grouping of businesses for payroll tax purposes</b> Speaker: Philip Magoffin, PPM Tax &amp; Legal</p> <p>Payroll tax legislation is broad reaching, including capturing businesses grouped with others. Provisions exist within the legislation for businesses to apply to de-group, based on specific facts and circumstances.</p> <p>This session will delve into the grouping legislation and consider topical practical issues that arise when looking to de-group businesses. In this session, we will also explore recent Court decisions relevant to payroll tax grouping.</p>
1:00-2:00pm	Lunch	



# Technical program

**Day 2** Thursday, 31 July 2025 continued

Time	Duties Stream	Payroll Tax Stream
2:00–3:00pm	<p><b>Session 5A: Renewable energy projects and state taxes</b>  <b>Speaker: Steven Paterson, Deloitte</b></p> <p>The stamp duty implications from investing into renewable energy projects can vary greatly depending on the nature of the project vehicle, the lifecycle stage of the project, and the assets held at the time of investment. In addition, these factors also highlight the lack of harmony between the jurisdictions, particularly for renewables projects held by unit trusts. This session will provide an update to the stamp duty and land/property tax issues faced by renewables projects, including:</p> <ul style="list-style-type: none"> <li>• How the nature of the project vehicle impacts the duty outcome</li> <li>• The different outcomes that can arise from different types of land tenure</li> <li>• Impact of fixtures and assets fixed to land on the duty outcome</li> <li>• Treatment of intangible assets</li> <li>• The consideration ‘gap’ and stamp duty implications</li> <li>• Land tax and potential surcharges; and</li> <li>• Commercial and industrial property tax in Victoria.</li> </ul>	<p><b>Session 5B: Reimagining payroll tax – A fresh take on the contractor provisions</b>  <b>Speakers: Alston Kam, Alvarez &amp; Marsal, Amanda Spinks, FTI, Alvarez &amp; Marsal</b></p> <p>Following the NSW “Inquiry into the application of the contractor and employment agent provisions in the Payroll Tax Act 2007”, you’ve been asked to start with a blank piece of paper and rewrite the contractor &amp; employment agent provisions. What would you design?</p> <p>The session will cover:</p> <ul style="list-style-type: none"> <li>• What are the current challenges and limitations with the existing contractor provisions in the Payroll Tax Act</li> <li>• If we were to rewrite the rules, what key elements should be considered to ensure fairness, simplicity, and compliance; and</li> <li>• What potential impacts could these changes have on the modern economy – including contractors, gig workers &amp; the businesses that engage them.</li> </ul> <p>This thought-provoking session aims to stimulate discussion and generate fresh ideas for a more efficient and effective payroll tax system.</p>
3:00–3:30pm	<b>Afternoon tea</b>	
3:30–4:30pm	<p><b>Session 6A: What are the duty issues for partnerships</b>  <b>Speaker: Matthew Sealey, FTI, PwC</b></p> <p>The distinctive duty treatment of partnerships continues to throw up interesting issues, particularly given the recent case law in this area. This session will revisit this topic, and touch on the following points:</p> <ul style="list-style-type: none"> <li>• What is the nature of a partner’s interest in a partnership</li> <li>• How are partnership transactions treated from a duty perspective in each jurisdiction</li> <li>• How are partnership interests treated in the context of landholder duty</li> <li>• Following the High Court case of <i>Rojoda</i>, could dealings in partnership interests also trigger duty consequences under the relevant trust acquisition/declaration of trust heads of duty; and</li> <li>• What duty considerations arise for professional services firms with an office in QLD.</li> </ul>	<p><b>Session 6B: Wages underpayments and payroll tax</b>  <b>Speakers: Steven Batrouney, Prince Consulting, Tim McIntosh, State Revenue Office Victoria</b></p> <p>Employers that identify wages underpayments face a myriad of implications, not the least of which is payroll tax. This session will discuss various payroll tax issues facing employers that find themselves in this situation and practical tips for advisors in managing these situations for their clients, including:</p> <ul style="list-style-type: none"> <li>• How far back the revenue office can reassess</li> <li>• Whether the liability arises in the period the wages should have been paid, or when they were paid in rectification</li> <li>• The position in Victoria, New South Wales, and other jurisdictions; and</li> <li>• How to practically manage historic exposures and data retention.</li> </ul>

# Technical program

**Day 2** Thursday, 31 July 2025 continued

Time	Session
4:30 - 5:30pm	<p><b>Session 7: AI technology</b> Speaker: Brad Kemp, State Revenue Office Victoria</p> <p>The world is embracing AI at a rapid pace. Revenue Offices are also looking at using AI to assist in tax administration.</p> <p>In this session, Brad Kemp, CIO of the Victorian State Revenue Office will discuss developments in this area and related technological topics which span the states and territories.</p>
From 7:00pm	<p><b>Convention dinner</b> Speaker: John de Wijn AM KC, CTA (Life)</p>



## Convention drinks & dinner

Enjoy the views of the stunning Hobart Waterfront over an evening of drinks and dinner alongside your colleagues, convention speakers, and State Revenue Officers.

**Date:** Thursday, 31 July 2025

**Time:** From 7:00pm

**Venue:** Grand Chancellor Hobart

**Price:** Inclusive for all full registration delegates  
Additional tickets are \$175 per person, see registration form for details

**Dress:** Business or business casual



# Technical program

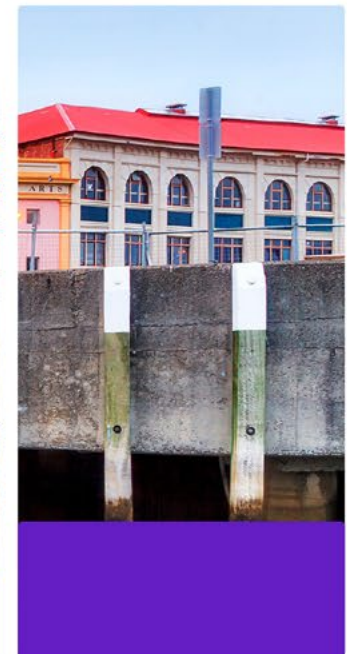
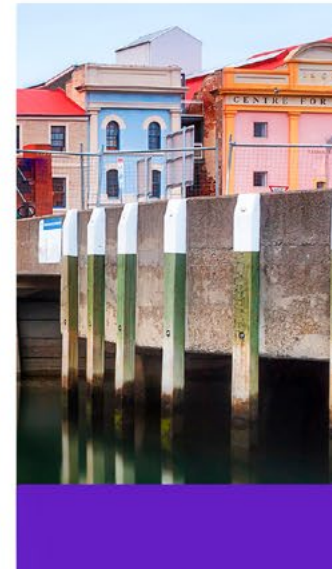
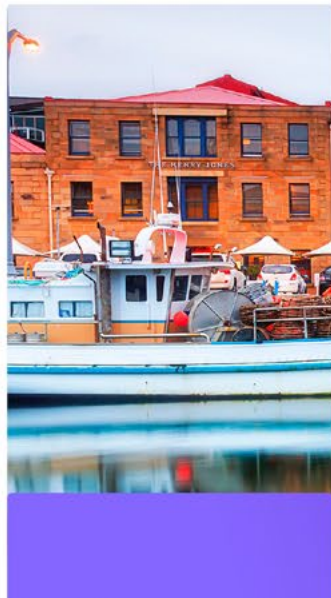
**Day 3** Friday, 1 August 2025

Time	Session
8:45–10:00am	<p><b>Session 8: Case and Legislative update</b>  <b>Speakers:</b> Bernard Goh, State Revenue Office Tasmania, Shohana Mohan, EY, Sarah Shaw, EY</p> <p>This session provides the perennial round-up and review of the year’s duties, payroll tax and land tax cases. A representative from the State Revenue offices will also outline some of the most important legislative changes and developments over the past 12 months across the eight states and territories.</p>
10:00–10:30am	<p><b>Morning tea</b></p>
	<p><b>Duties Stream</b> <span style="float: right;"><b>Payroll Tax Stream</b></span></p>
10:30am–12:00pm	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p><b>Session 9A: Duties – The big ones</b>  <b>Speakers:</b> Joanne Seve, State Taxes Consultant, Sarah Shaw, EY, Jacqueline Wood, CTA, KPMG</p> <p>A panel, comprised of leaders in tax practice and administration, will discuss and analyse the most significant duties cases, the issues they bring to light, and implications for practice and administration.</p> </div> <div style="width: 48%;"> <p><b>Session 9B: Payroll tax – The big ones</b>  <b>Speakers:</b> Philip Magoffin, PPM Tax &amp; Legal, Shohana Mohan, EY, Rosie Muirden, PwC</p> <p>A panel, comprised of leaders in tax practice and administration, will discuss and analyse the most significant payroll cases, the issues they bring to light, and implications for practice and administration.</p> </div> </div>
12:00–1:00pm	<p><b>Lunch</b></p>
1:00–2:00pm	<div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p><b>Session 10A: When GST and state tax issues intersect</b>  <b>Speaker:</b> Matthew Cridland, CTA, K + L Gates</p> <p>Understanding how GST interacts with state-based taxes is essential for effective property transaction structuring. This session examines key areas where federal and state tax regimes intersect, focusing on complex compliance and planning issues, including:</p> <ul style="list-style-type: none"> <li>• The ATO’s GST ruling on development leases and its implications for duty and land tax</li> <li>• Structuring sales as going concerns to reduce transfer duty and address ATO scrutiny of GST risks</li> <li>• The benefits and GST limitations of duty partition concessions, particularly for residential property</li> <li>• GST and duty implications of joint developments structured as partnerships; and</li> <li>• The impact of GST withholding on development agreements, especially in Victoria, and its effect on payment flows in residential projects.</li> </ul> </div> <div style="width: 48%;"> <p><b>Session 10B: Problems without answer – Where things don’t work</b>  <b>Speaker:</b> Rosie Muirden, PwC</p> <p>Leveraging real life examples and trends, this session will discuss topical questions currently unanswerable by the payroll tax legislation and guidance. Case studies and potential solutions to these questions will also be discussed.</p> </div> </div>

# Technical program

**Day 3** Friday, 1 August 2025 continued

Time	Session
2:00 - 2:30pm	Afternoon tea
2:30 - 3:15pm	<b>Session 11: Closing panel</b> Panel: Jonathon Root, Commissioner, State Revenue Office Tasmania, Sarah Rummery, Commissioner, Territory Revenue, Joanne Seve, State Taxes Consultant This panel of Commissioner's and practitioners will discuss the topical issues that arose through the course of the convention, as well as questions "on notice" as contributed by delegates.
3:15pm	<b>Convention closing address</b> Speaker: Jodie Fogale, EY, Co-Chair, State Taxes Convention Organising Committee



# Presenters

**Steven Batrouney** has 30+ years' experience as a tax advisor and has been specialising in employment taxes including Payroll Tax for over 20 years. His career has primarily been within the profession and the 'Big 4'. Steve led the employment taxes stream of work with one of the earliest large wage remediation projects. Steve now leads the Tax practice within Prince Consulting Group Pty Ltd, a specialist workforce compliance and optimisation consultancy including Payroll and workforce management, Historic remediation, Tax & superannuation as well as Compliance audits.

**Matthew Cridland, CTA**, is a Partner in the Tax Team at K&L Gates and based in Sydney. He focuses on matters relating to GST and all State Taxes. Matthew has been in practice for more than 24 years and he advises clients across a broad range of industry sectors. In addition to assisting clients with deals advice and revenue office reviews, he also has experience advising on litigation matters. Matthew is involved with the indirect tax committees of industry groups including the Property Council of Australia and the Financial Services Council. He is also a Contributor to the Australian Financial Review and often comments on indirect tax related issues. He is a Chartered Tax Adviser.

**John de Wijn KC AM, CTA (Life)**, specialises in revenue law, with a particular emphasis on taxation law and stamp duty. John was called to the Bar in 1984, after practising as a solicitor for 9 years. He took silk in 1997. John is regularly consulted by large corporations and the Australian Taxation Office seeking advice on the intersection of revenue law and commercial practices. John served as a Victorian State Councillor of the Taxation Institute of Australia from 1989 to 1997 and again from 2002. He was president of the Taxation Institute in 2005. John has also been a member of the Taxation Committee of the Law Council.

**Bernard Goh** is a Specialist Legal Advisor in the Revenue Branch of the State Revenue Office Tasmania. Bernard's role includes acting as a delegate of the Commissioner of State Revenue in determining objections to decisions and/or assessments issued by the Commissioner, working with the Office of the Solicitor-General Tasmania to assist the Revenue Branch with legal and statutory interpretation matters, working with the Office of the State Litigator Tasmania in administrative review and appeal proceedings of state taxation decisions and/or assessments, engagement with inter-jurisdictional committees on state taxes, and assisting

with legislative drafting. Prior to this, Bernard worked in the in-house legal team of the Department of Health, Tasmania and in private legal practice.

**Cedric Hodges** is the leader of the Deloitte Access Economics team in Tasmania as well as the economic modelling team nationally. He has spent the last 15 years using economic models to shed light on important policy questions and evaluate the potential economic impacts of major projects. His pet gripe is the number of surface car parks in Hobart and you're going to hear about it.

**Alston Kam** is a Senior Director with Alvarez & Marsal Tax in Sydney, specialising in employment tax advisory. Alston has over 12 years of experience specialising in employment tax & payroll risk and governance, process improvement, and advising on large-scale remediation programs. He has worked with clients across a range of industries, including government, health, and financial services, and has experience in both Australia and the UK. His recent work includes leading employment tax compliance services for approximately 45 NSW State Government agencies, with a focus on FBT and payroll tax. Additionally, he served as the lead tax adviser to a major financial services client

on superannuation non-compliance, overseeing the identification and quantification of historical shortfalls, advising on remediation strategies, and managing voluntary disclosures to the ATO.

**Brad Kemp** was appointed Executive Director of Business Technology Services (BTS) at the Victorian State Revenue Office in December 2023. Before joining the State Revenue Office, Brad was Head of Information Technology at the Transport Accident Commission (TAC) and WorkSafe Victoria. Under Brad's leadership, BTS will continue to modernise our technology services, ensuring we provide a secure, accessible and efficient digital experience for our customers. Brad has a Master of Business Administration from Deakin University, a Bachelor of Applied Science (Mathematics/Computer Science) from Monash University and a range of technical qualifications.

**Scott Lang** is a Tax Counsel at Allens with over 10 years experience in federal and state taxes. He advises across a variety of sectors, including government, energy and resources, property and funds management, corporate insolvency, private wealth and the not-for-profit sector. Scott has experience across Australian income tax (including capital gains tax), GST, stamp duty, land tax and charities law.

# Presenters

**Philip Magoffin** is a founding Director of PPM Tax & Legal Australia Pty Ltd, a boutique indirect tax firm based in Brisbane. Philip has almost 30 years of specialist experience in payroll tax, land tax and stamp duties (for all states and territories). With regard to payroll tax, he advises clients on audits, grouping, exclusion orders and employment agent provisions especially with regard to professional arrangements. He has acted as instructing solicitor in many state tax litigation matters. Formerly from the Queensland Revenue Office and some of the Big 4 global firms, Philip also specialises in mergers and acquisitions and operations taxes such as long service leave levies for multinational corporate groups, regional businesses and other professional practices.

**Tim McIntosh** is Director, Policy and Legislation, State Revenue Office Victoria. Tim's responsibilities include overseeing the delivery of policy advice and legislative services to support the Victorian government's state taxes legislation program. Tim has considerable state taxation experience, having worked in a range of policy, advisory and tax reform roles for over 15 years.

**Craig Milner, CTA**, is a Partner in the Allens Tax group, with more than 20 years of experience in providing tax advice. He

is a lead taxation lawyer in transactions and projects for clients including in the funds, real estate, finance and energy sectors. He advises on mergers and acquisitions, group restructures, inbound and outbound investment and exit tax issues, fund creation and managed funds structures, property development structures, workouts and insolvency transactions, securitisation programmes and associated note issues, financing arrangements and general corporate tax issues.

**Shohana Mohan** is a Director in EY's Employment Taxes practice in Sydney, with over 20 years of expertise in employment tax compliance and advisory for large employers. Her experience spans employment tax reviews, compliance processes, payroll tax audits, and conducting due diligence reviews across South Africa, the UK, and Australia. She specialises in Fringe Benefits Tax, Superannuation, managing state payroll tax audits, compliance for significant taxpayers, and wage remediation. Additionally, she contributes to professional publications by writing tax technical articles for various platforms.

**Rosie Muirden** is a Melbourne based Director in PwC's Employment Taxes practice. Rosie has over 10 years'

experience assisting clients with all of their employment tax matters, including payroll tax, superannuation guarantee, fringe benefits tax, PAYG withholding and workers' compensation. She has also worked extensively on the employment tax risks for non-traditional worker arrangements (such as contractors), as well as in the tax deals space, assisting clients with the identification of payroll tax risks for the buy-side and sell-side.

**Steven Paterson** is a partner in Deloitte's State Taxes team and has over 25 years' experience in advising on state taxes (particularly stamp duty, land tax, foreign surcharges and Victorian property taxes) in every Australian jurisdiction. Over his career, Steven has been involved with numerous major transactions in Australia and gained a working knowledge of some of the most unique and complex business and transaction structuring. Steven has a keen interest in major infrastructure projects and renewable energy transactions. He is able to use this knowledge in the ever changing tax and stamp duty landscape. Steven has published numerous bulletins and other publications on the changes to indirect tax legislation as well as interpretation and practice and have been called upon to provide expert comments in the general media. Steven sits on a number of professional liaison committees and

also provides strategic guidance and direction for peak industry groups.

**Jonathon Root** has been Deputy Secretary, Revenue Gaming and Licensing in the Tasmanian Department of Treasury and Finance since 2011, being ex officio the Commissioner of State Revenue and Commissioner for Licensing. Prior to that he was Deputy Secretary Corporate Support in the same agency and had roles in both the Commonwealth and the private sector.

**Sarah Rummery** was appointed Executive Director, Revenue in January 2020 and holds the following the roles of Commissioner of Territory Revenue and Mineral Royalty Secretary. She is responsible for the administration and enforcement of own-source revenue and grants legislation, ensuring the strategic alignment and effectiveness of revenue programs, and providing high level policy, strategic and technical advice. Her previous roles include Assistant Under Treasurer (Economic) and Commissioner of Superannuation in the Funds Management division. Sarah joined the Department of Treasury and Finance in 2005 after 10 years working as an economics lecturer in the United States. Sarah has a Bachelor of Economics from the University of Western Australia and a PhD in Economics from the Australian National University.

# Presenters

**Matthew Sealey, FTI**, is a Partner at PwC Australia focusing on State tax advice and disputes. He has over 25 years' experience in this area, including nearly a decade at the NSW Bar, where he appeared in many State tax cases.

**Joanne Seve** is a sole practitioner Solicitor and State Taxes Consultant specialising in Australian State Taxes. Joanne was formerly a partner of Freehill Hollingdale & Page and of PricewaterhouseCoopers and a part-time Judicial Member of the NSW Civil and Administrative Tribunal assigned to the Revenue Division and Appeal Panel. She is a member of the PCA NSW/Revenue NSW Tax Committee. Joanne established and administers four state taxes websites and provides a State Taxes email updates subscription service.

**Sarah Shaw** is a Partner at EY specialising in stamp duty and land tax, and has also advised on tax controversy, and GST matters. Sarah has over 19 years' experience and has previously worked at KPMG, Ashurst and Minter Ellison. With in-depth specialist knowledge of stamp duty and land tax, Sarah is able to provide her clients with commercial, tax-effective structuring advice. Outside of EY, Sarah is the Chair of the Property Council of Australia's (PCA) Victorian Taxation and Economic

Trends Committee. Sarah provides assistance on policy development across all areas of Victoria's tax system, and provides technical advice on Victorian revenue legislation, including stamp duty, land tax and tax design.

**Amanda Spinks, FTI**, is a Managing Director with Alvarez & Marsal Tax in Sydney specialising in Australian employment taxes. Her primary areas of concentration are superannuation, fringe benefits tax (FBT), payroll tax, and Pay As You Go (PAYG) withholding, including payments to contractor, employees and directors. With nearly twenty years of tax experience, Amanda has extensive experience advising all types of clients across all aspects of Australian employment taxes. Amanda was invited to present to NSW Parliament for its inquiry into payroll tax for contractors and employment agents and is also working closely with the ATO & Treasury for the upcoming Payday Super legislation changes. Prior to joining A&M, Amanda spent nearly three years with Microsoft, where she was responsible for the overall management and leadership of Australian statutory and tax compliance. In addition to meeting internal and external regulatory obligations across employment taxes, income tax, SOX & IFRS, Amanda was responsible for transformation projects

including global pricing adjustments and foreign currency implications.

**Paula Thorne** has been the Executive Director of the Policy, Advisory and Legal Services Division, State Revenue Office, Victoria, since 2015. Paula has extensive state taxation experience, having worked in a range of state taxation legal, policy and project / tax reform roles for over 17 years. Paula holds a Bachelor of Laws, a Diploma of Litigation, and a Master of Business Administration.

**Jacqueline Wood, CTA**, is a Director at KPMG and works in the Deal Advisory -

Tax team, with particular focus on stamp duty and land tax. She has specialised in State Taxes since 2004. She has worked on a broad range of commercial transactions including due diligence, structuring transactions, obtaining exemptions and concessions, and resolving issues with tax and revenue authorities. Jacqueline has particular expertise in mergers and acquisitions, corporate restructuring and funds management. She is a member of the Victorian State Revenue Office's State Taxes Consultative Council.



# Venue and accommodation



## Hotel Grand Chancellor Hobart

1 Davey St, Hobart TAS 7000

Hotel Grand Chancellor Hobart is a 4 ½ star leading hotel. Perfectly positioned directly on Hobart’s waterfront, the Hotel Grand Chancellor offers stunning views of the River Derwent and surrounds. The central location means that it’s a short walk from all areas of the city and major attractions, with Salamanca, Battery Point, city centre shopping and the MONA ferry only a few minutes’ walk away. Discover the very best of Hobart at Hotel Grand Chancellor, where style and convenience blend seamlessly to offer you the perfect waterfront accommodation experience.

### Getting there

Hotel Grand Chancellor Hobart is located at 1 Davey Street, Hobart, 18kms away from Hobart International Airport it’s a 20-minute drive via the Tasman Highway. Sky bus, driving, taxi, or transfer information can all be found [here](#).

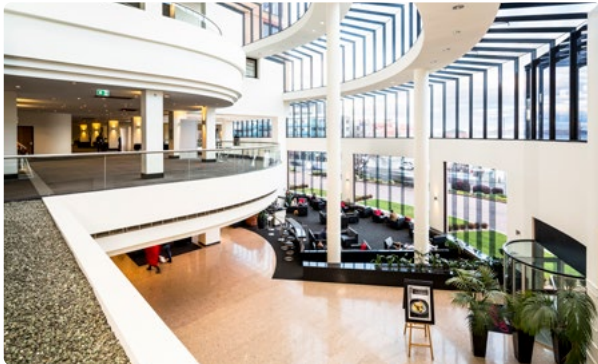
### Parking

Secure undercover parking is located onsite, subject to availability. Please note that charges will apply for this service. Additional parking is located a short walk from the Hotel at Market Place Carpark (open 24hours), Dunn Street Carpark as well as on street metered parking. For prices and further information, [click here](#).

### Accommodation

Favourable room rates have been negotiated and secured at Hotel Grand Chancellor Hobart. Accommodation bookings can be made by following the link on the event web page or by [clicking here](#). Please ensure you click the “access special rates here” button at the bottom of the page to access the special rate.

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.



# Event information

## Networking functions

### Welcome Reception – Franklin Wharf Restaurant & Bar

A welcome reception will be held prior to the convention on Wednesday evening. The welcome reception is included in the convention 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

### Convention dinner

A convention dinner will be held on Thursday from 7.00pm at the Grand Chancellor Hobart. The convention dinner is included in the full registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$175. Please indicate your requirements, including dietary requirements, at the time of registration.

## 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](mailto: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.

If a registered delegate is unable to attend as a result of a diagnosis of COVID-19 or they are experiencing symptoms of COVID-19, a full refund will be offered with the provision that a medical certificate is produced explaining the diagnosis or a summary of the appropriate action to be taken i.e. a COVID-19 test and medical advice.

## 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](mailto:nationalevents@taxinstitute.com.au).

For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au).

# Registration

## Registration inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ convention lunches	Welcome reception and Convention dinner*
<b>Full registration</b> This registration option entitles one delegate to attend the entire event.	✓	✓	✓

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

## Discounts

### Early bird registration

All registrations received and paid on or before Friday, 27 June 2025 will be entitled to an early bird discount.


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

### Group discounts

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

This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information, please contact the national Events Team on 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

## Register now!



**Register online** ▶

**Register via form** ▶  
included in this brochure





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

## 1 Registration

Please see page 16 for registration inclusions.

### Full registration - 12 CPD hours

	Member	New member*	Non-member
<b>Early bird registration</b> Register on or before 27 June 2025	<input type="checkbox"/> \$1,795	<input type="checkbox"/> \$2,190	<input type="checkbox"/> \$2,095
<b>Standard registration</b> Register after 27 June 2025	<input type="checkbox"/> \$1,995	<input type="checkbox"/> \$2,390	<input type="checkbox"/> \$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.

- 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 networking function at \$80 per person

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

Dietary requirements:

### Convention dinner

The Convention dinner at the Grand Chancellor Hobart is INCLUDED in the registration fee for delegates attending the full convention.

- 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 convention dinner at \$175 per person

No.  x tickets at \$175 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](http://taxinstitute.com.au/membership)

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

Signature:

Date of signature:



### 3 Breakout session options

Please advise below which sessions you would like to attend during the forum.

#### Thursday, 31 July 2025

- |              |                                     |                                     |
|--------------|-------------------------------------|-------------------------------------|
| 12:00–1:00pm | <input type="checkbox"/> Session 4A | <input type="checkbox"/> Session 4B |
| 2:00–3:00pm  | <input type="checkbox"/> Session 5A | <input type="checkbox"/> Session 5B |
| 3:30–4:30pm  | <input type="checkbox"/> Session 6A | <input type="checkbox"/> Session 6B |

#### Friday, 1 August 2025

- |                 |                                      |                                      |
|-----------------|--------------------------------------|--------------------------------------|
| 10:30am–12:00pm | <input type="checkbox"/> Session 9A  | <input type="checkbox"/> Session 9B  |
| 1:00–2:00pm     | <input type="checkbox"/> Session 10A | <input type="checkbox"/> Session 10B |

### 3 Payment summary

Registration fees	\$	<input type="text"/>
Additional guest tickets – Welcome reception (\$80)	\$	<input type="text"/>
Additional guest tickets – Convention dinner (\$175)	\$	<input type="text"/>
<b>Total payable</b>	\$	<input type="text"/>

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

For event enquiries, please contact the National Events Team on **1300 829 338** or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au)

For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

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### 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](http://taxinstitute.com.au/professional-development/event-policy).





**To register**

Email [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

Mail Level 21, 60 Margaret Street, Sydney NSW 2000

Online [taxinstitute.com.au](http://taxinstitute.com.au)

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