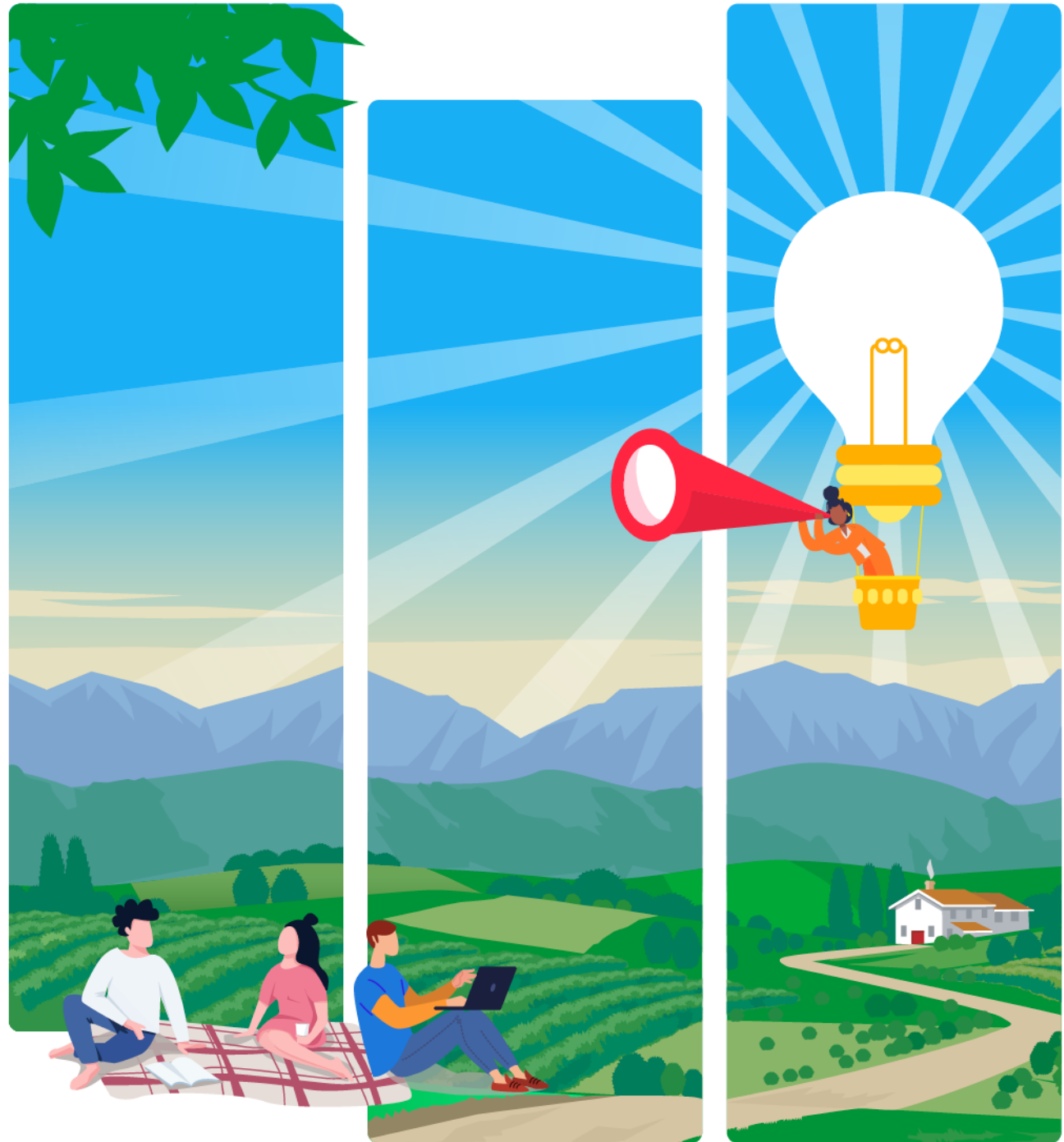


# Yarra Valley Tax Retreat

**24–25 July 2025**

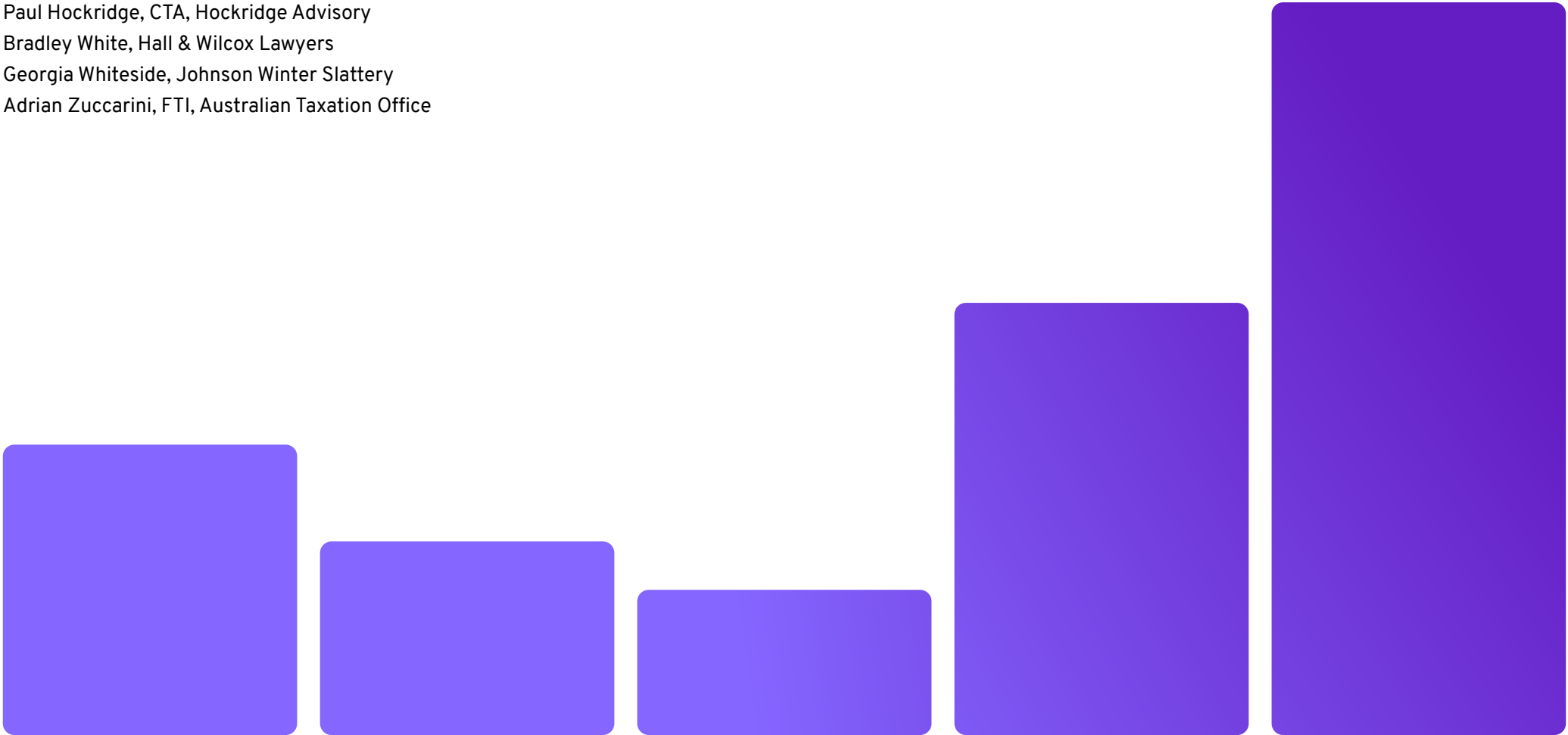
**Balgownie Estate Yarra Valley**

**12 CPD hours**



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

- Rachel O'Donnell, CTA, O'Donnell Tax Law, Chair, Organising Committee
- Daniel Angelovich, Forvis Mazars
- Megan Bishop, Piper Alderman
- Neil Brydges, CTA, Sladen Legal
- Karen Goodfellow, CTA, Goodfellow Tax Advisory
- Paul Hockridge, CTA, Hockridge Advisory
- Bradley White, Hall & Wilcox Lawyers
- Georgia Whiteside, Johnson Winter Slattery
- Adrian Zuccarini, FTI, Australian Taxation Office





# Welcome

**YVTR 2025 – Tax is like a box of chocolates ... but with knowledge and planning, you can know what you're going to get!**

The Yarra Valley is known for its beautiful scenery and its tasty produce, including premium chocolates.

Opening a box of chocolates and taking your pick or going with a random choice can be delicious! A unique or new flavour can delight your palate. Old favourites can bring back fond memories and make us appreciate experienced chocolatiers. In contrast, unique and new taxes can be a cause of grave concern for taxpayers, whilst old, recurrent tax issues can leave a bitter taste in their mouth.

Our Retreat Organising Committee welcomes you to this year's Yarra Valley Tax Retreat. We'll help you to temper your clients' concerns by bringing you across some of the latest issues in tax and arming you with leading edge, practical knowledge.

Located in the gorgeous Yarra Valley region at the Balgownie Estate, our program provides a box full of premium tax sessions. Our excellent presenters will share their knowledge and experience during our valuable technical sessions, with genuine insights to guide us in applying our complex tax laws in practice. Through our interactive workshops, we'll apply our new knowledge to bring it all together (the tax equivalent of ensuring the perfect 'snap', and avoiding chocolate bloom and excess bitterness).

Our first three sessions this year will focus on property taxes (perhaps likened to planting and harvesting the best cacao beans, and extracting cacao butter and cocoa cake) before we flow into a stream of frothy hot topics that include delving into debt tools and strategies, and the ever-present themes of residency and succession planning. Finally, we will wrap up with the after-dinner-mints of tax; extracting private wealth, and making and correcting GST mistakes (how best to treat sugar bloom or redeem mildly burnt chocolate).

Our three workshops will add flavour and further substance to the content covered during the technical sessions, providing delegates an opportunity to consolidate their knowledge and apply it to practical case studies.

We also look forward to networking, relaxing, unwinding, and dining within the brilliant surrounds of the Yarra Valley at our retreat dinner!

Regardless of whether you love chocolate, our 2025 Yarra Valley Tax Retreat Organising Committee looks forward to seeing you in July!



**Rachel O'Donnell, CTA**  
Chair, Retreat Organising Committee

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

# Technical program

## Day 1 Thursday, 24 July 2025

| Time *AEST       | Session   |
|------------------|---|
| 9:00–9:30am      | Registration and light morning tea  |
| 9:30–10:00am     | <b>Welcome and opening address</b><br>Speakers: Rachel O'Donnell, CTA, Chair, Retreat Organising Committee, Tim Sandow, CTA, President, The Tax Institute   |
| 10:00–11:00am    | <b>Session 1: Taxation and the Property Development Lifecycle – Pre-acquisition to Disposal and Everything in-between</b><br>Speaker: Prudence Barker, VIC Bar<br><br>The Victorian property market is bursting with a fusion of competing factors, sparking questions as to whether the worst is over. One thing is for certain, the taxation of small-scale property developments is not getting any simpler!<br><br>This session will work through various stages of the development lifecycle highlighting key considerations, such as income tax, GST, and basics of state tax considerations.<br><br>Join us as we work through the practical implications of small-scale property developments, answering questions such as, what happens if an expected sale doesn't go through? And, what are the implications of a change of intention?   |
| 11:00am–12:00 pm | <b>Session 2: Empty homes and headaches – Victoria's latest taxes</b><br>Speaker: Andrew Spierings, VIC Bar<br><br>The landscape of state taxes is continuously evolving, with new taxes being introduced and existing ones expanding. One such change is the Victorian Vacant Residential Land Tax (VRLT), which, effective 1 January 2025, could potentially apply to any residential land in Victoria. Further expansion is set to take effect 1 January 2026.<br><br>In this session, you'll gain a clear understanding of the VRLT, including practical examples that illustrate when it may apply, the circumstances under which you could qualify for an exemption, and proactive measures to prevent the tax from affecting you.<br><br>Even if you're not based in Victoria, this session is still invaluable. Given the potential for other states and territories to introduce similar legislation—just as we saw with foreign owner surcharges in the past—it's important to stay ahead of these changes.<br><br>Additionally, we'll provide a brief overview of the new short stay levy, often referred to as the "Airbnb tax," to keep you informed of other emerging tax developments.<br><br>Don't miss out on this opportunity to stay ahead of the curve! |
| 12:00–1:00pm     | Lunch   |

# Technical program

## Day 1 Thursday, 24 July 2025 continued

| Time *AEST  | Session   |
|-------------|---|
| 1:00–2:00pm | <p><b>Session 3: CGT Common Issues: A ‘Grab Bag’ of Challenges and Opportunities</b><br/> <b>Speaker:</b> Michael Parker, CTA, Hall &amp; Wilcox Lawyers</p> <p>Capital Gains Tax (CGT) is fraught with complexities, and even the most seasoned tax practitioners can encounter unexpected hurdles. In this practical session, Michael will delve into a collection of common CGT issues, uncovering hidden traps and opportunities that may arise in practice.</p> <p>With the Small Business CGT concessions under increased ATO scrutiny, understanding the nuances of the eligibility criteria is more critical than ever. This session will revisit the key eligibility requirements for these concessions and explore other common CGT pitfalls, including using the small business restructure rollover (Subdivision 328-G) incorrectly and misapplication of the market value substitution rule.</p> <p>With a practical, solutions-focused approach, this session will equip you with strategies to navigate these issues with ease and ensure your clients can effectively access CGT relief where available.</p>  |
| 2:00–3:30pm | <p><b>Workshop 1: Growing cacao beans to extracting cacao butter and cocoa cake</b><br/> <b>Workshop Leader:</b> Daniel Angelovich, Forvis Mazars<br/> <b>Workshop Facilitators:</b> Prudence Barker, VIC Bar, Michael Parker, CTA, Hall &amp; Wilcox Lawyers, Andrew Spierings, VIC Bar</p> <p>Our first workshop will take us through the full journey from growing cacao beans to extracting cacao butter and cocoa cake. Well not literally, this is after all a Tax Retreat. As such, we will be working through several case studies providing practical examples of the small-scale developments lifecycle and broader issues associated with the ownership of property in Victoria, including navigating through the rocky road of Victorian State tax issues. Finally, should we be lucky enough to find the golden ticket and be assessed on capital account, we will work through a practical, solutions-focused approach to equip us all with strategies to navigate through the curly GGT provisions.</p> <p>This workshop will tackle many burning questions including the age-old question whether it is possible for to have our cake and eat it too? Or as they say in France “Vouloir le beurre et l’argent du beurre” translating literally to “To want the butter and the money from the butter” or in our case cocoa butter.</p> |
| 3:30–4:00pm | <b>Afternoon tea</b>  |
| 4:00–5:00pm | <p><b>Session 4: Succession planning – the ATO is watching</b><br/> <b>Speaker:</b> To be announced</p> <p>In light of remarks made by Louise Clarke (Private Wealth Deputy Commissioner ATO) earlier this year regarding her priorities for 2025, there can be no better time to attend a session on the tax risks associated with succession planning. This presentation will touch on those areas in tax that commonly feature when planning to keep wealth in the family by passing it on to the next generation, such as the Small Business CGT Concessions, Division 7A, Family Trust Elections, provisions applying to trusts and more.</p>  |



# Technical program

## Day 1 Thursday, 24 July 2025 continued

| Time *AEST     | Session   |
|----------------|---|
| 5:00 – 6:00pm  | <p><b>Session 5: Managing taxpayer debt: ATO and Advisor perspectives</b></p> <p>Speakers: Megan Bishop, Piper Alderman, Anna Longley, Australian Taxation Office</p> <p>The ATO's is changing its approach to collecting debt, with a focus on GST, PAYGW and super guarantee charge and the 1% of taxpayers who owe 20% of the collectable debt. During this session our speakers will cover some of the topical issues and challenges arising in this space for both the ATO and taxpayers and their advisors. The session will cover:</p> <ul style="list-style-type: none"><li>• The payment landscape and the current ATO approach to debt collection</li><li>• Director Penalty Notices (DPNs), including the different types of DPNs and defences available</li><li>• Support for those who cannot lodge or pay on time</li></ul> |
| 6:00 – 7:00pm  | <b>Delegate Free time</b>   |
| 7:00 – 10:00pm | <b>Yarra Valley showcase and retreat dinner</b>   |



### Yarra Valley showcase and retreat dinner

Showcasing the best of the Yarra Valley, join your colleagues, peers and our esteemed presenters for an evening of networking. Keep toasty by the fire, enjoy divine wine and delicious food from Victoria's premier wine region.

**Date:** Thursday, 24 July 2025

**Time:** 7:00–10:00pm

**Venue:** Balgownie Estate Yarra Valley

**Price:** Inclusive for all full registration delegates  
\$150 for additional tickets – see registration form for details

**Dress:** Business or Business casual

# Technical program

## Day 2 Friday, 25 July 2025

| Time *AEST        | Session  |
|-------------------|--|
| 8:30 – 9:30am     | <p><b>Session 6: Tax residence planning – inbound &amp; outbound</b><br/> <b>Speaker:</b> Denise Honey, CTA, Pitcher Partners</p> <p>With an increasingly mobile workforce and complex tax laws across borders, proper planning for changes in residency is essential. This session will consider several tips and traps including (but not limited to):</p> <ul style="list-style-type: none"> <li>• Residency and temporary residency for individuals and fact patterns that might indicate a change.</li> <li>• Commencement and cessation of Australian tax residency and temporary residency and key watch-outs.</li> <li>• Tax treaty tie-breaker provisions for individuals.</li> <li>• Dealing with related structures such as companies, trusts and retirement funds.</li> </ul>  |
| 9:30 – 10:00am    | Morning tea  |
| 10:00 – 11:30am   | <p><b>Workshop 2: The Chocolate Ganache Session</b><br/> <b>Workshop Leader:</b> Paul Hockridge, CTA, Hockridge Advisory<br/> <b>Workshop Facilitators:</b> Megan Bishop, Piper Alderman, Denise Honey, CTA, Pitcher Partners, Anna Longley, Australian Taxation Office</p> <p>We will cover a lot of ground in our second workshop! We'll kick off by delving into a practical application of the CGT small business relief provisions, with the myriad of issues to consider in the context of an asset disposal. We will then examine the ATO's current approach to debt collection and how it demands a new response from advisers, including what to do when your client receives a Director Penalty Notice. The chocolate ganache for this workshop will involve a deep dive into the nuances of tax residence planning, where there are various choices and elections that require consideration, which we will overlay with the complexities of residency tie-breaker rules and other interesting issues, such as whether Div 7A can apply to loans from a foreign family company.</p> |
| 11:30am – 12:30pm | <p><b>Session 7: Extracting private wealth from private companies – look before you leap</b><br/> <b>Speaker:</b> Rob Warnock, CTA, Harwood Andrews</p> <p>Our tax system ensures that a company is not a personal bank account or cash box to be dipped into as and when required without tax implications (whether we understand them or not). In tough economic times, the temptation is to not pay close enough attention to the tax pitfalls in accessing wealth located within a company or a corporate structure. This session looks at the tax hurdles to successful wealth extraction.</p>  |
| 12:30 – 1:30pm    | Lunch  |

# Technical program

**Day 2** Friday, 25 July 2025 *continued*

| Time *AEST    | Session   |
|---------------|---|
| 1.30 – 2.30pm | <p><b>Session 8: How to treat sugar bloom or redeem mildly burnt chocolate – GST corrections, adjustments, and other changes</b></p> <p>Speaker: Rachel O'Donnell, CTA, O'Donnell Tax Law</p> <p>Everyone makes mistakes sometimes – even the most compliant taxpayers and the best advisors!</p> <p>This session delves into an area that gives rise to common misconceptions and concerns. How should taxpayers correct GST mistakes? Are all mistakes created equal, or are some more significant (requiring a different approach) than others (spoiler alert – different mistakes and changes can require different approaches)? What GST impact do bad and doubtful debts have for our clients?</p> <p>Common adjustments and corrections are sometimes simpler (or more complex!) than they might appear at first blush. It is crucial that we guide our clients in the right direction when these issues arise.</p> <p>Rachel will also discuss the importance of the ongoing monitoring and broader consideration of our clients' enterprises and their purposes, to provide the best vantage point from which to proactively address any changes of purpose and other changes that can alter our clients' registration and compliance requirements and entitlements.</p> |
| 2:30 – 3:30pm | <p><b>Workshop 3: After-dinner mints</b></p> <p>Workshop Leader: Karen Goodfellow, CTA, Goodfellow Tax Advisory</p> <p>Workshop Facilitators: Rachel O'Donnell, CTA, O'Donnell Tax Law, Rob Warnock, CTA, Harwood Andrews</p> <p>We will wrap up the YVTR with a third and final workshop. We will use a case study to demonstrate the successful and tax effective extraction of wealth from private companies, and what hazards await those who (mistakenly) treat the resources of their company as if they were their own. We will also embark on the murky world of correcting GST errors, oversights and changes in circumstances. Is an amendment to a previous BAS called for, is there in fact an adjustment event that must be dealt with in the current BAS, or is there a change that does not result in any adjustments, corrections, or amendments? Our workshop case study will cover all of this and more, all applied in a practical context.</p>  |
| 3:30pm        | <b>Closing address and networking drinks</b>  |





# Presenters

**Daniel Angelovich** is a Senior Manager in the Tax Consulting Team of Forvis Mazars Melbourne. Daniel graduated from Deakin University with a Bachelor of Commerce (with distinction) and Law and completed a Masters in Taxation at the University of Melbourne. He is a Chartered Accountant. As a Senior Manager in the Forvis Mazars Tax Consulting Team, Daniel assists clients with navigating through the complexities of the Australian taxation system both from a domestic and global perspective, with a focus on achieving their overall goals and objectives.

**Prudence Barker** is a Barrister specializing in taxation and commercial law. Her expertise encompasses state and Federal tax issues, bankruptcy, and contract law. She brings a wealth of experience to the Bar from her previous roles in tax at the Australian Taxation Office and EY, as well commercial experience as CEO of a medium-sized export business.

**Megan Bishop** is a Tax Partner at Piper Alderman specialising in tax risk management and disputes. She assists a wide range of clients in their interactions with the revenue authorities across the compliance spectrum from early engagement mechanisms such as

private rulings right through to litigation, including before the High Court. Her areas of specialisation include private group and trust related tax issues, employment taxes, residency and the R&D tax incentive.

**Denise Honey, CTA**, leads the International Tax Group at Pitcher Partners. She has many years of experience providing international tax, structuring and tax controversy advice to corporate and trust groups and their key stakeholders. Denise is an Accredited Tax Law Specialist with the Law Institute of Victoria, participates on a number of consultation forums and is a regular presenter at the Institute's events

**Karen Goodfellow, CTA**, is the owner and principal of Goodfellow Tax Advisory Pty Ltd, providing specialist tax consulting services and training to accountants, lawyers and other advisors to SMEs and family groups. She is an experienced tax professional with extensive experience in the tax advising and education (CPD/CPE) space. As the founder and operator of two successful tax training businesses Karen has detailed knowledge of Australia's federal tax system. Karen's extensive experience providing tax advice

and training gives her an excellent understanding of the most pressing issues facing tax practitioners such as CGT roll-overs, the Small business CGT concessions, the CGT main residence exemption, taxation of trusts and taxation of companies.

**Paul Hockridge, CTA**, is the Principal of Hockridge Advisory. He has worked for the ATO, a large law firm, has been a partner in medium and Big 4 chartered accounting firms and has over 30 years' experience in tax, asset protection, estate and succession planning. Paul's niches include litigation support, property development and FBT and salary packaging. Paul specialises in advising high wealth families and closely held businesses, as well as providing support for a number of accounting and law firms. Paul maintains a practicing certificate as a legal practitioner in Victoria, is a fellow of Chartered Accountants Australian and New Zealand, is senior fellow and teaches in the Masters program in the Law School at the University of Melbourne and is a chartered tax adviser. He sits on The Tax Institute's FBT and Employment Taxes Committee and for several years contributed to The Tax Institute's book, Estate and Business Succession Planning. Perhaps Paul is

best known as a regular presenter at local, State and National Tax Institute conferences.

**Anna Longley** is Deputy Commissioner, Frontline Risk and Strategy. In this role, Anna is responsible for setting strategic direction for the Frontline Operations group, particularly on registration, lodgment and payment, and managing external stakeholder engagement. Previously, Anna has worked on lodgment and enforcement strategies, providing recommendations on the ATO's strategy for ensuring timely lodgment of taxation obligations, and tailored strategies for enforcing high-risk debts, and in a number of Assistant Commissioner roles in the Private Wealth business line, across Behaviours of Concern, Engagement and Assurance, and Technical Advice and Guidance. From 2019 until 2023, Anna was Assistant Commissioner General Counsel at the Australian Charities and Not-for-profits Commission. In that role, Anna was the senior legal adviser to the ACNC Commissioner, was a member of the ACNC Executive and Performance, Audit and Risk Committee, and had operational leadership of the ACNC. Anna also has significant experience in administrative law, dispute resolution and litigation.

# Presenters

**Rachel O'Donnell, CTA**, of O'Donnell Tax Law, specialises in GST, duties and land tax across all Australian states and territories, and recently introduced state property taxes (such as the Victorian windfall gains tax and commercial and industrial property tax). Rachel has significant experience advising large listed and unlisted corporates, high net worth individuals and small to medium enterprises. With more than 20 years of experience advising on tax law, she has a broad range and depth of experience and is very familiar with the operation and technicalities of the GST and various state and territory tax regimes, which are constantly evolving. Rachel's clients have included major international and national companies / trusts / groups in the property development, property funds management, infrastructure, superannuation, and retirement living / aged care industries, as well as high net wealth family groups.

**Michael Parker, CTA**, is a Partner in the Taxation section of Hall & Wilcox Lawyers. His practice focuses on tax disputes, domestic income tax issues, including CGT and Div 7A, business sales, acquisitions and restructures and GST. Michael has extensive experience handling a broad range of taxpayer disputes, including disputes concerning the small business CGT concessions,

having acted for the taxpayers in *White v FCT* [2009] FCA 880, *White v FCT* [2012] FCA 109 and *Altnot v FCT* [2013] AATA 140, among other cases. Michael regularly consults to the Board of Taxation and Treasury, including in respect of Div 7A, small business impediments and the small business CGT concessions. He is a regular presenter for The Tax Institute.

**Andrew Spierings, ATI**, is a barrister at the Victorian Bar. He practises in federal and state taxes, equity and trusts, deceased estates and general commercial disputes. He also accepts briefs in family law matters with significant tax, trusts or commercial issues. Prior to the Bar, Andrew was a Senior Associate in the taxation practice at Arnold Bloch Leibler in Melbourne with experience in a range of income tax, GST and state taxes issues. At ABL, he had an extensive practice in tax advice and disputes, particularly for high-net-wealth families and their groups. He also oversaw day-to-day operation of the firm's national state taxes practice with a particular focus on stamp duties and land tax. Coming from a beef property in West Gippsland, Andrew also has a particular interest in matters with agricultural or related issues. Andrew holds a Bachelor of Laws (with First Class Honours) and a Bachelor of Commerce from Monash University.

**Robert Warnock, CTA**, is a Principal Lawyer at Harwood Andrews, Victoria's largest firm with a head office based in a regional centre. Rob has over 30 years' experience in tax advising. Rob helps

accountants, businesses and individuals on matters with his areas of practice including trusts, state and federal taxes, tax disputes, business structuring and asset protection.



# Venue and accommodation



## Balgownie Estate Yarra Valley

1309 Melba Highway, Yarra Glen, VIC 3775

Balgownie Estate guarantees an unforgettable business event with breathtaking views, dedicated conference spaces, unique accommodation options, exceptional cuisine and renowned Balgownie Estate wine.

### Getting there

Located just an hour's drive from Melbourne's CBD and Tullamarine airport in the stunning Yarra Valley. Car hire is readily available at Melbourne Airport, and we encourage you to book when registering for the event.

### Parking

Balgownie Estate Yarra Valley has free parking available for retreat guests.

### Accommodation

Balgownie Estate Yarra Valley offers luxurious accommodation with stunning views of the resort. Accommodation is limited, book early to avoid disappointment. A corporate rate has been negotiated with Balgownie Estate Yarra Valley. Please call 03 9730 0700 or email [hello@balgownie.com](mailto:hello@balgownie.com) and quote "The Tax Institute" to secure your booking.

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.

### Fitness and relaxation

#### Spa

You deserve to pamper yourself! Book a relaxing massage or treatment at the onsite Endota Spa. Located at Balgownie Estate Yarra Valley, making it easier than ever to restore the mind and body before or after the retreat. Bookings are essential. To book, please contact Endota Spa on 03 5971 8720

#### Pool

The swimming pool at Balgownie Estate Yarra Valley offers a refreshing retreat, ideal for a tranquil float or an invigorating swim. Open daily from 6 am to 9 pm, the pool is perfectly sized for relaxation or enjoying a few laps in peaceful surroundings.

#### Gym

Stay fit even while away from home in our fully equipped gymnasium at the Balgownie Estate Yarra Valley. Open daily from 6 am to 9 pm, the gym features a variety of equipment to cater to all your fitness needs.

Planning to stay for the weekend? As accommodation is limited, we recommend you book your accommodation as soon as possible to avoid disappointment.

For more accommodation options, please click [here](#).





# Stay and play in the world-famous Yarra Valley

The Yarra Valley is widely renowned as Victoria's premier wine region, however there is an extensive number of other unique experiences for you to enjoy too. From hot-air ballooning to cycling and wildlife spotting, there is something for everyone! Some highlights are below, but for more information head to [www.visityarravalley.com.au](http://www.visityarravalley.com.au) to plan your stay.

## Thrill seekers

Soak up the fresh air in the picturesque Victorian countryside by completing one of the many walking or cycling trails. The ever-popular Lilydale-Warburton Rail Trail will provide wonderful views of the scenery, while those who would like more of a challenge could attempt to cycle to the Mt Donna Buang summit.

Experience the ultimate adrenaline rush and the region from above, with Hot Air Ballooning, plane rides and sky diving.

## History buffs

A must visit for all history buffs is Coombe Yarra Valley. Once the home of Dame Nellie Melba, the estate is a bustling seven acres of stunning gardens famous for its high teas and Devonshire tea. Learn about the life of Dame Nellie Melba and her ever important role in Australian history. Climb aboard Puffing Billy Railway, an iconic attraction in the area. Weave through forests and over historical trestle bridges as you make stops in a variety of local towns along the way.

## Art enthusiasts

You'll find plenty of private galleries dotted across the region, highlights include Forging Ahead Metal Sculptures, TarraWarra Museum of Art, Monsalvat Art Centre and The Waterwheel Art Gallery at Warburton.

## Wildlife warriors

Take a short 10-minute drive to Healesville Sanctuary where you can wander through serene tracks and meet over 200 species of Australian animals. You will be in awe of the beauty, strength and power of the Australian wildlife. With daily shows including: Spirits of the Sky and Tales from Platypus Creek, this is an experience not to be missed.

## Snow lovers

Take a drive to one of Victoria's many pristine alpine mountains. You could be enjoying the snow in just under an hour at Mount Donna Buang or Lake Mountain.

## Food, wine and drink connoisseurs

With over 80 cellar doors, it's easy to eat and drink your way around the Yarra Valley. A variety of food and wine tours operate 7 days a week.

Home to the world's best gin, Four Pillars Gin is the first Australian distillery to be awarded International Gin Producer of the Year in 2019. Visit the iconic distillery in Healesville and immerse yourself in one of their distillery masterclasses. These classes sell out very early, bookings are essential.

A must attend is the Yarra Valley Chocolaterie, just out of Yarra Glen. Taste their delicious creations or attend a chocolate making workshop.

Yarra Valley harvests some of the best produce, including berries, limes, lemons and kiwi fruit. Fresh is always best, with an abundance of U-Pick farms, there is always something delicious in season to pick. Operating every Saturday from 8.30am to 1pm in Healesville, the Yarra Valley Organic Farmers Market is a must to get the freshest organically grown produce at affordable prices.

For more information or ideas for your stay click [here](#).



# 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

Attendance at the conference counts for 12 hours of Continuing Professional Development 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 retreat.

## Networking functions

### Yarra Valley showcase and retreat dinner – Balgownie Estate Yarra Valley

Following a day of technical sessions, delegates are invited to unwind with the casual style retreat dinner featuring the finest fresh produce and wines from the Yarra Valley region. Participate in the pre-dinner Yarra Valley showcase where local food and drink providers will come to you exhibiting the best of the Yarra Valley. The Yarra Valley showcase and retreat dinner is included in the registration fee for full retreat delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$150.





# Registration

## Registration inclusions

|   | Online access<br>to presentations<br>and technical<br>papers | Morning/<br>afternoon tea/<br>retreat lunches | Yarra Valley<br>Showcase,<br>retreat dinner<br>and closing<br>drinks* |
|---|--|---|---|
| <b>Full registration</b><br>This registration option entitles<br>one delegate to attend the entire<br>event | ✓✓   | ✓✓  | ✓✓  |

\*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 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 three full registrations (early bird or standard) and receive a fourth full registration for free. The free fourth registration must be of equal or of less value to the three 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 14 for registration inclusions.

### Full registration – 12 CPD hours

|   | Member                           | New member*                      | Non-member                       |
|---|----------------------------------|----------------------------------|----------------------------------|
| <b>Face to face Early bird registration</b><br>Register on or before 27 June 2025 | <input type="checkbox"/> \$1,495 | <input type="checkbox"/> \$1,890 | <input type="checkbox"/> \$1,795 |
| <b>Face to face Standard registration</b><br>Register after 27 June 2025          | <input type="checkbox"/> \$1,695 | <input type="checkbox"/> \$2,090 | <input type="checkbox"/> \$1,995 |

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

### Networking function

The networking function is INCLUDED in the registration fee for delegates attending the full retreat.

### Yarra Valley showcase & retreat dinner | Thursday, 24 July 2025 at Balgownie Estate Yarra Valley

- ☐ Yes, I WILL be attending the Yarra Valley showcase & retreat dinner OR
- ☐ No, I WILL NOT be attending the Yarra Valley showcase & retreat dinner
- ☐ Yes, I require additional tickets for the Yarra Valley showcase & dinner at \$150 per person

No.  x tickets at \$150 each: \$

Dietary requirements:

### Retreat Closing drinks

The closing drinks is INCLUDED in the registration fee for delegates attending the full retreat.

### Friday, 25 July at Balgownie Estate Yarra Valley

- ☐ Yes, I WILL be attending the Retreat closing drinks
- ☐ No, I WILL NOT be attending the Retreat closing drinks
- ☐ Yes, I require additional tickets for the Retreat closing drinks at \$35 per person

No.  x tickets at \$35 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 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](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:

JOIN TODAY

### 3 Payment summary

### Registration fees

\$ 

Additional guest tickets – Yarra Valley showcase & retreat dinner (\$150 each)

\$

Additional guest tickets – Closing drinks (\$35 each)

\$ **Total payable**

\$

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

#### 4 Payment method

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

☐ **Cheque payable to The Tax Institute** (in Australian dollars)

☐ **Credit card**    Card type: ☐ AMEX   ☐ Visa   ☐ MasterCard   ☐ Diners

Name on card:

Card no.:

|  |
|--|
|  |
|--|

Expiry date:

MM/YY

Cardholder's  
signature:

For our refund, cancellation and replacement policy visit [taxinstitute.com.au/professional-development/event-policy](https://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](mailto:nationalevents@taxinstitute.com.au)

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

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## 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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