The Tax Institute

Death and Taxes Conference

28-29 Oct 2026 | CPD 12

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

Todd Bromwich, Hall & Wilcox, Chair, Death & Taxes Conference Organising Committee

Neil Brydges, CTA, Sladen Legal

Lachlan Einsiedel, CTA, Suzanne Lytteton Lawyers

Yikai Hoe, CTA, Provident Lawyers

Archana Manapakkam, FTI, Velocity Legal

Victoria Mercer, BusinessDEPOT

Timothy Munro, ATI, Change Accountants & Advisors

Katerina Peiros, ATI, Hartwell Legal

Josh Philo, ATI, Estate First Lawyers

Paul Talkington, Talking Tax and Accounting

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Welcome

It is my pleasure to welcome you to this year's Death & Taxes Conference, Australia's leading conference dedicated to the taxation and administration of deceased estates. As the premier event in this specialised area, it remains a must-attend conference for tax, legal and financial professionals.

We are entering a transitional phase for the Australian tax landscape. Many of these changes will impact on tax-effective succession planning and the taxation of estates. This is occurring in the context of an unprecedented intergenerational transfer of wealth, increasingly complex family, business and investment structuring, and significant growth in estate litigation. As these challenges evolve, so too does our need to stay informed of the latest developments, technical issues and practical strategies for effective estate planning and administration.

Our program has been carefully curated to address current and developing issues and ensure attendees stay at the forefront of their profession. Across two days, delegates will hear from leading experts on topics including planning for a transition to the next generation, taxation of testamentary trusts, philanthropy in the estate plan, loans & UPEs in the estate, current superannuation issues and cross-border estates.

The conference will commence with a panel session on current and developing issues, including a senior ATO representative, and we will conclude with our ever-popular Great Debate. This year's debate topic is Weekend at Bernie's: Keeping the Discretionary Testamentary Trust Alive.

This conference offers a unique opportunity to practitioners of all experience levels to gain valuable technical insights, practical guidance and real-world perspectives from industry leaders. It also provides an excellent forum to connect with peers and grow your network.

Thank you to this year's organising committee members for their dedication and expertise to deliver an outstanding program, and to our speakers and delegates for their continued support of the conference.

I look forward to welcoming you to The Calile Hotel in Brisbane, or online, for two days of insightful discussion, practical learning and valuable professional connections.

Todd Bromwich
Chair, Conference Organising Committee

Early bird pricing offer
Register on or before Friday, 18 September 2026 to save!

Technical program

Day 1 Wednesday, 28 October 2026

Time AEST	Session
8:30 – 9:15am	**Registration**
9:15 – 9:30am	**Welcome and President's address**
9:30 – 10:30am	**Session 1: Current and Developing Issues** Panellists: Anthony Bach, CTA, Australian Taxation Office, Lyn Freshwater, BNR Partners, Dung Lam, CTA, West Garbutt This panel discussion will draw together the key tax, superannuation and estate administration developments currently affecting deceased estates and succession planning. Designed as a scene-setting session for the broader conference, it will identify the issues practitioners should have on their radar, where the law is settled, where ATO guidance is emerging and where further legislative or administrative change may still be required.
10:30 – 11:00am	**Morning tea**
11:00am – 12:00pm	**Session 2: Deceased Estates – Mapping the Post-Death Tax Landscape** Speakers: Andrew Clements, FTI, Mallesons, Paula Yu, Mallesons Administering a deceased estate may at times look deceptively straightforward. In practice, navigating tax law complexities within the confines of estate planning documents can become difficult very quickly for executors, beneficiaries and their advisers. This is especially so where questions arise about who is taxed on estate income, when a beneficiary becomes presently entitled, how CGT issues are dealt with, whether franking credits can flow through the estate efficiently, the impact of foreign estate duties, and how philanthropic gifts should be approached. This session will provide a practical, high-level overview of the taxation of deceased estates. It will cover: • The basic framework and common technical issues (including present entitlement, CGT, franking credits and other issues); • Proposed budget measures, and how broader trust and CGT reforms may affect deceased estates and related testamentary structures, including testamentary trusts, if enacted • How these issues play out in practice.

Technical program

Day 1 Wednesday, 28 October 2026 continued

Time AEST	Session
12:00 – 1:00pm	**Session 3: Planning for the Next Generation** **Speaker: Natalie Cameron, CTA, Elda Legal** With ongoing debate around trusts, bucket companies, CGT settings and the future taxation of family wealth, advisers are increasingly being asked: what is the right structure, and what can be done with existing structures? This practical, case study-based session will explore structuring considerations for family groups in light of current and proposed tax settings, including the future use of trusts, companies and bucket companies, CGT discount and indexation issues, and the role of future shares. The session will also consider how accountants can discuss these issues with clients, particularly as the significant intergenerational wealth transfer brings more complex estate planning, asset protection and family law considerations to the surface. It will highlight the need for closer collaboration between accountants and lawyers on trust deed reviews, documentation, succession planning and legal risk management. Using common family scenarios, including standard family groups and blended family arrangements, this session will provide practical guidance on identifying structuring issues, managing risk and helping clients make informed decisions about their current and future arrangements.
1:00 – 2:00pm	**Lunch**
2:00 – 3:00pm	**Session 4: Transferring Ownership and Control of Structures** **Speaker: Grant Abbott, SMSF Strategies** While the "transfer of wealth" is a key focus for clients, advisers know that the "transfer of control" should be the key focus for wealth protection and preservation. This is vital for clients who want to keep key family assets out of their estate to avoid family provision claims. This session will examine the options for clients to have a coordinated estate planning and asset protection approach, with a particular focus on key terms in company constitutions, trust deeds, and SMSF deeds which allow for a "locked-in" succession of control.
3:00 – 3:30pm	**Afternoon tea**
3:30 – 4:30pm	**Session 5: Testamentary Trusts Revisited** **Speaker: Emma Woolley, CTA, Hall & Wilcox Lawyers** This technical session will provide a practical foundation on the key estate planning, tax and asset protection issues relevant to testamentary trusts. The session will explore drafting considerations, including separate testamentary trusts versus a single group testamentary trust, and options for building flexibility into the will for beneficiaries. It will also examine the taxation of testamentary trusts, including the Division 128 CGT rollover, the treatment of accumulated and distributed income, and distributions to minor beneficiaries. The session will consider the latest available developments affecting CGT and the taxation of trusts, including relevant federal Budget announcements, and their potential implications for testamentary trust planning. It will also address the asset protection benefits and limitations of testamentary trusts, including practical steps advisers can take to strengthen the intended protection.

Technical program

Day 1 Wednesday, 28 October 2026 continued

Time AEST	Session
4:30–5:30pm	**Session 6: Philanthropy in the Estate Plan** **Speaker: Rachel Vijayaraj, CTA, Brown Wright Stein Lawyers** Charitable giving through estate planning can deliver significant philanthropic and tax outcomes, but the rules are technical and the timing of the gift can materially affect the result. This session will examine the key structures and tax issues that arise when charitable giving is incorporated into deceased estates, testamentary trusts and private charitable structures such as private ancillary funds. The session will consider the structural issues surrounding charitable bequests, charitable testamentary trusts and the transfer of control of private charitable structures after death. It will also compare the tax outcomes of gifting during lifetime and gifting on death, including the treatment of testamentary gifts, the denial of deductions under section 30-15 for certain testamentary gifts, and the interaction with the section 118-60 CGT exemption. The session will also address distributions of income to charities, including streaming issues and the integrity rules surrounding such gifts. Using practical examples and case studies, this session will provide advisers with a framework for identifying opportunities and managing tax risks when clients wish to leave a philanthropic legacy.
5:30pm	**Networking function**

Networking function

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

Date: Wednesday, 28 October 2026

Time: 5:30–7:30pm

Venue: The Calile Hotel

Price: Inclusive for all full registration delegates
$80 for additional tickets – see registration form for details

Dress: Business casual

Technical program

Day 2 Thursday, 29 October 2026

Time AEST	Session
8:30 – 9:30am	**Session 7: Death and the Small Business CGT Concessions** **Speaker: Peter Bardos, CTA, HLB Mann Judd** The interaction between Division 152 and the CGT rules on death adds significant complexity to estate and succession planning. This session unpacks how the small business CGT concessions operate when a taxpayer dies, including when a legal personal representative or beneficiaries may access the concessions and how timing, ownership and structural arrangements before death influence eligibility. We will also work through common problem areas such as meeting the significant individual and active asset tests, dealing with pre-CGT assets, and addressing ATO integrity concerns where concessions are sought as part of a broader succession strategy. The session will also consider the interaction with recent CGT changes including the 30% minimum tax rate and changes to the small business turnover test covering practical examples of where this does and does not expand eligibility.
9:30 – 10:30am	**Session 8: Don't Fear the Reaper – Practical Superannuation Strategies at Death** **Speaker: Keeghan Silcock, Cooper Grace Ward Lawyers** The rules governing superannuation death benefits are anything but straightforward. Between tax, pensions, trust deeds, nominations and estate planning considerations, there are a myriad of traps and opportunities that advisers need to navigate. This session will examine some of the key practical and technical issues that arise on the death of a member, together with strategies for achieving effective outcomes for clients and their beneficiaries, and protecting the advisers against professional risk. • Insurance proceeds and death benefits • Applying ECPI following death • Death benefit instruments and control mechanisms • Revisionary pensions in practice • Paying death benefits • Trustee decision making and disputes • Estate planning gone wrong.
10:30 – 11:00am	**Morning tea**

Technical program

Day 2 Thursday, 29 October 2026 continued

Time AEST	Session
11:00am – 12:00pm	**Session 9: Dealing with Loans and UPEs in the Estate** **Speaker: Daniel Smedley, CTA, Sladen Legal** Loans, unpaid present entitlements, and other debts can materially affect the design and administration of an estate plan. Amounts recorded as beneficiary loans, drawings, current accounts, Division 7A loans, or UPEs may need to be recovered, repaid, forgiven, assigned, or otherwise dealt with in a manner that manages both Division 7A and section 100A risk. This session will: • Consider how practitioners should identify and deal with loans and UPEs owed by and to the deceased. It will also examine the section 100A framework, the ordinary family or commercial dealing exception, and the CGT consequences that can arise when estate assets are realised or loans are forgiven, released or assigned; • Focus on practical estate planning and administration issues, drawing on recent cases including Bendel; and • Include practical examples and case studies and will provide a framework for advising clients before death and assisting executors after death, with an emphasis on documentation, tax compliance and when to seek advice.
12:00 – 1:00pm	**Session 10: International Session: Estates with International Elements — Executors, Beneficiaries and Assets** **Speaker: Nicole Bryant, FTI, The Macro Group** As families, assets and executors increasingly span multiple jurisdictions, estate administration is rarely confined to Australia. This session will examine the tax and practical issues that arise where an Australian deceased estate has international elements, including offshore executors, foreign beneficiaries and assets located overseas. The session will consider residency issues for executors and estates, including how offshore control may affect the taxation of estate income and capital gains. It will also explore the treatment of distributions to foreign beneficiaries, including CGT event K3 and section 98 treatment of distributions, and the availability of concessions such as the main residence exemption and CGT discount. Practical issues will also be addressed, including the taxation and transfer of offshore assets, international tax treaty considerations, access to foreign dividends and trust distributions, foreign withholding taxes, foreign income tax offset considerations and FIRB issues where offshore executors, trustees or beneficiaries take title to Australian assets. The session will provide practitioners with a practical framework for identifying and managing cross-border risks in estate planning and administration.
1:00 – 2:00pm	**Lunch**

Technical program

Day 2 Thursday, 29 October 2026 continued

Time AEST	Session
2:00 – 3:00pm	**Session 11: Because Death Wasn't Complicated Enough – Enter Division 296** Speaker: Neal Dallas, CTA, BusinessDEPOT For many years, advisers have grappled with the complexities that arise on the death of a superannuation member. Division 296 of the *Income Tax Assessment Act 1997* (Cth) introduces a further layer of complexity to an already challenging area. While much of the discussion has focused on the taxation of large superannuation balances in superannuation funds (particularly SMSFs) during a member's lifetime, the implications of Division 296 at death may be equally significant. This session will explore the practical issues accountants and advisers need to consider, including: • Reversionary pension • Death benefit nominations and estate planning • Estate administration challenges • Fund liquidity and asset realisation • Planning opportunities and strategies
3:00 – 3:30pm	**Afternoon tea**
3:30 – 4:30pm	**Session 12: The Great Debate – Weekend at Bernie's: Keeping the Discretionary Testamentary Trust Alive** **Debaters: Michael Garrone, CTA, Mage Advisory, Laura Hanrahan, Hall & Wilcox, Dung Lam, CTA, West Garbutt** **Adjudicator: Josh Philo, ATI, Estate First** Back by popular demand, the last session of the conference will be a lively and engaging debate on whether discretionary testamentary trusts remain an appropriate and effective estate planning/succession tool. Knowledgeable panellists on both sides will present arguments for and against the use of discretionary testamentary trusts in estate planning, particularly in light of the recent federal Budget announcements. The panellists will advance arguments as to whether there are any alternatives to discretionary testamentary trusts, or whether they are still appropriate even in light of the proposed Budget measures and include arguments on: • Whether there are still tax benefits in having discretionary testamentary trusts • The use of bucket companies or other discretionary beneficiaries • If fixed (bare) testamentary trusts are a better vehicle. The session will be sure to prompt a lively discussion among the panellists and audience and it has always been a great way to finish off the conference.
4:30pm	**Conference close**

Presenters

Grant Abbot is Australia's leading SMSF expert, trainer and presenter. Since the introduction of SMSFs in 1994, Grant has presented on the subject to more than 20,000 accountants, trained 500 accountants to become specialist SMSF advisers and written four sold out editions of "The SMSF Strategy Guide" for professional publisher. Grant is Principal of SMSF Strategies, a firm located in Sydney that provides accountants with strategic and technical advice, trust deeds, pension. Grant also reserves and investment strategy Kits, specialist training and back office tools and resources to enhance the revenue and profitability of an existing SMSF operation.

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

Peter Bardos, CTA, is a Partner in HLB Mann Judd's Private Tax team. He is regarded for his ability to advise on complex tax matters, combining his technical knowledge with a practical understanding of commercial and industry-specific considerations. Peter has experience working across private and corporate clients, including business transactions, restructures, succession planning and private equity structures. Peter has assisted taxpayers through disputes including tribunal and federal court listings.

Nicole Bryant, FTI, is a Chartered Accountant, Australian Registered Tax Agent, and US CPA (California) with 30 years' experience in taxation in Australia and the US. Nicole is currently the Managing Director of The Macro Group Chartered Accountants as well as a Partner at Dualis International LLP. Previously, Nicole was the Vice President of International Tax for Billabong International Limited, responsible for all global taxation matters for the then ASX-listed entity. Nicole also spent 16 years at PricewaterhouseCoopers, with nearly five of those years as a Tax Partner. In addition to her achievements in Australian and international tax, Nicole continues to provide both Australian and US tax services and advice to clients through her own practice. Her passion for innovative long-term strategic planning and practical detail-driven solutions allows her to continually create positive outcomes for her clients. Nicole has a Bachelor of Commerce, a Master of Taxation, and is a Fellow of The Taxation Institute of Australia.

Natalie Cameron, CTA, is an accomplished lawyer with over nine years' experience advising business owners, high-net-worth individuals and family groups on taxation, succession planning and wealth transfer strategies. Her practice focuses on tax structuring, estate planning, business succession and the taxation of private groups. Natalie regularly advises on the intersection of tax and estate planning, helping clients navigate complex family and ownership structures, intergenerational wealth transfers, trusts, superannuation, business succession and retirement planning. She is known for her practical, commercially focused approach and her ability to translate complex tax and legal issues into clear, actionable advice for clients and their advisers. As the founder of Elda Legal, Natalie works closely with accountants, financial advisers and business owners to develop integrated succession and estate planning solutions that protect family wealth, achieve manageable taxation outcomes and facilitate smooth transitions between generations.

Andrew Clements, FTI, is a Senior Consultant in the Tax group at Mallesons with more than 35 years' experience advising private clients, family offices, family business groups and trustees on complex taxation and wealth structuring matters. He is recognised for his deep expertise in trusts, succession planning, family governance, intergenerational wealth transfer, estate and asset protection structures, and the taxation issues affecting high net worth individuals and family groups. Andrew advises on the taxation and legal issues associated with discretionary trusts, unit trusts, private groups, investment structures and family office arrangements. His practice includes the design and implementation of sophisticated ownership, control and succession frameworks, together with advising on trust restructures, family business succession, capital gains tax, international tax and taxation issues arising from private investment activities. He is also widely recognised for his work in employee ownership structures, employee share schemes and executive remuneration, and regularly advises on the interaction of these arrangements

Presenters

with broader private wealth and succession objectives. Andrew is a member of the National Tax Leadership for Mallesons' Generative AI programs. In addition to using a broad range of Generative AI tools in practice, he has worked closely with the firm's innovation and executive leadership teams on the evaluation, piloting and implementation of emerging AI technologies across the Tax group.

Neal Dallas, CTA, is the Legal Director at BusinessDEPOT. He has extensive experience advising clients in the areas of superannuation, tax, estate planning and asset protection. He is recognised in the 2027 edition of Best Lawyers in Australia in the areas of superannuation law, tax law, trusts and estates, and wealth management/succession planning practice.

Lyn Freshwater is a Senior Tax Consultant with BNR Partners and provides written advice on complex estate and trust matters. She commenced with BNR in 2019 after a lengthy ATO career where she gained considerable experience as an administrator particularly in the context of the capital gains tax and trust provisions. Some of her ATO career highlights included instructing on the drafting of the scrip-for-scrip rollover provisions and streaming rules for capital gains and franked dividends, authoring various pieces of public advice such as PS LA 2003/12 (about the meaning of legal personal representative (LPR)), TR 2006/14 (about life and remainder interests), TR 2010/D1 (about income of a trust estate), PCG 2018/4 (about the liabilities of an LPR), developing ATO views in various litigation cases such as Electnet and Sandini and her role as Secretariat of the Trust Consultation Sub-group. Since joining BNR Partners, Lyn has co-authored a number of books about tax and deceased estates and has been a member of the STEP Advocacy committee.

Michael Garrone, CTA, is a trusted figure in the industry with decades of experience across business, accounting and tax. Known for his pragmatic approach, delivering clear advice and practical solutions that work; Michael is valued for his high level of care and responsiveness with clients and practitioners alike. Michael is regarded as unique in the industry; his combination of expertise, executing the most favourable outcome for his clients is rare. Michael aims to be accessible and easy to work with; providing options, explaining in clear terms and empowering clients to make informed decisions. Michael is a Business Owner, Chartered Tax Adviser and Tax Agent.

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

Dung Lam, CTA, is a Principal at West Garbutt and is based in Sydney. Dung with decades of experience in advising on a wide variety of taxes including income tax, capital gains tax, GST and state taxes such as duty, payroll tax and land tax. Dung also has extensive experience advising on taxation trusts, superannuation issues in the self-managed superannuation funds arena and tax issues related to estate planning. Dung is a Chartered Tax Adviser, full member of the Society of Trusts and Estate Practitioners, an accredited Specialist in Business and Personal Tax with the NSW Law Society, a member of the Business Law Section Taxation Committee of the Law Council of Australia and a member of the NSW Law Society Liaison Committee with the Revenue NSW. Dung advises a broad range of clients ranging from corporates, small to medium enterprises, high net worth individuals, professional firms, accountants, financial planners and their clients.

Keeghan Silcock is a senior associate in Cooper Grace Ward's private client team, Keeghan assists clients with a broad range of technical legal matters including tax and structuring issues, self-managed superannuation, trusts and asset protection. Keeghan also regularly assists clients with their estate planning, business succession and exit strategies. Her focus in on providing clients with quality advice to ensure favourable, practical and commercial outcomes.

Presenters

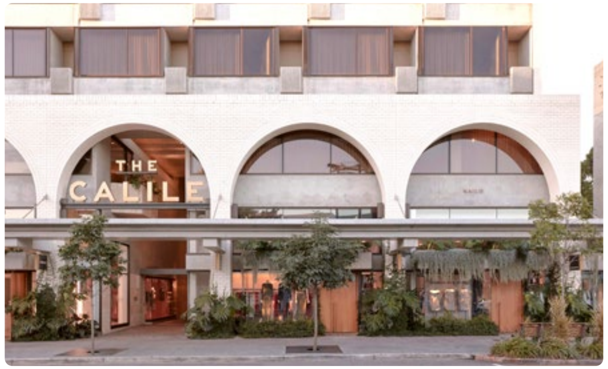
Daniel Smedley, CTA, enjoys helping private enterprise clients solve complex taxation and trust law issues. He is a trusted confidant in planning the succession of his clients' personal and business affairs. Daniel is a Chartered Tax Adviser (The Tax Institute) and an Accredited Specialist in Taxation Law (Law Institute of Victoria). He is recognised by his peers in Doyles Guide and Best Lawyers for his work in Taxation, Trusts and Succession Planning. Daniel is a regular presenter at state and national industry conventions, conferences and workshops.

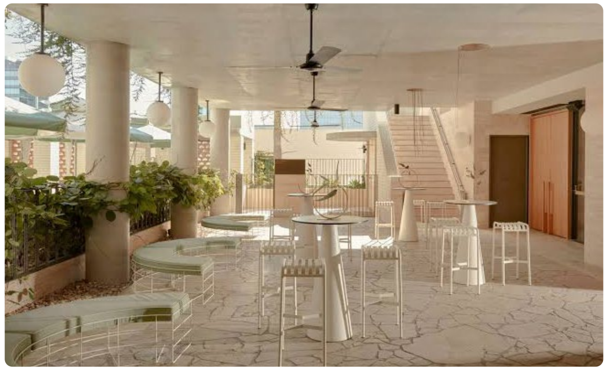
Rachel Vijayaraj, CTA, is a Partner at Brown Wright Stein Lawyers with a broad practice advising high-net wealth individuals, professionals, philanthropists, family groups and family offices on commercial, tax, trust, complex estate and succession planning and estate administration. Rachel values forming meaningful relationships with clients and providing advice in collaboration with their accountants on their personal, business and tax affairs. Rachel also heads up the not-for-profits practice, assisting clients establish charitable funds and organisations, and providing advice on structuring, tax concessions, fundraising and governance.

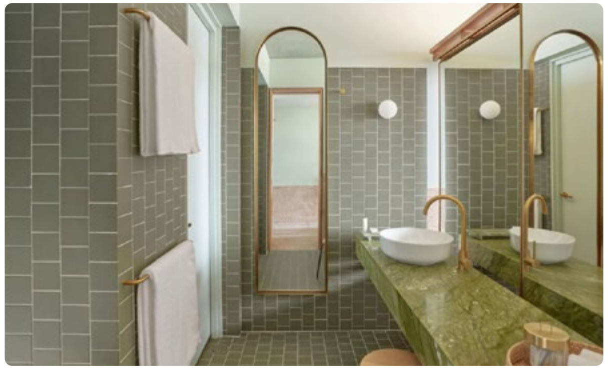
Emma Woolley, CTA, of Hall & Wilcox Lawyers has extensive experience in advising clients in estate planning and estate administration, trust establishment and ongoing administration, trust estate disputes, and structuring for succession of ownership and control of private and family businesses. She leads Hall & Wilcox Lawyers' Family Office Advisory practice. Emma's clients include high net worth individuals, families and privately held businesses.

Paula Yu is a Solicitor at Mallesons Taxation group. She has worked across a range of tax controversy, corporate tax and stamp duty advisory matters.

Venue and accommodation







The Calile Hotel

48 James Street, Fortitude Valley, QLD 4006

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

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

Favourable room rates have been negotiated. Book your accommodation here.

Getting to The Calile Hotel

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

The Calile Hotel has secure carparking available, please follow the link to book directly.

Nearby accommodation

Guests seeking alternative accommodation arrangements, may wish to consider the following nearby options within walking distance to The Calile.

Sage Hotel James Street | 2-minute walk from The Calile Hotel

The Alva Hotel Brisbane | 6-minute walk from The Calile Hotel

Alpha Mosaic Hotel Fortitude Valley | 4-minute walk from The Calile Hotel

Please contact the hotels directly for availability and current rates.

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 conference.

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 Wednesday from 5:30pm at The Calile Hotel. The networking function is included in the conference registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of $80. Please indicate your requirements, including dietary requirements, at the time of registration.

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control, including "an act of god", "pandemic", "health-related event" or "government requirements", we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

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/ conference lunches	Networking function*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Online full registration This registration option entitles one delegate to attend the entire event.	✓		

*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, 18 September will be entitled to an early bird discount.

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

Group discounts

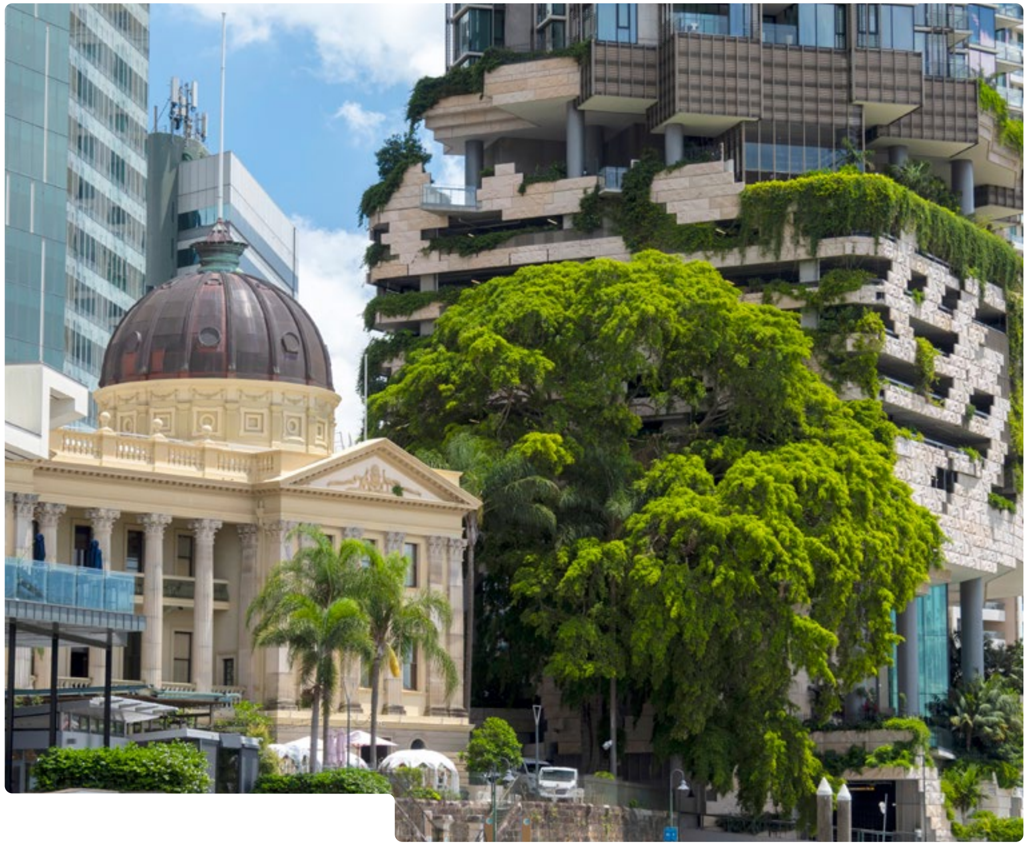
Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

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



The Tax Institute

Death & Taxes Conference
Registration form

45227 | WD

A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain the 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 Friday, 18 September	☐ $1,795	☐ $2,215	☐ $2,095
Standard registration Register after Friday, 18 September	☐ $1,995	☐ $2,415	☐ $2,295

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

Networking function

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

Wednesday, 28 October 2026 at The Calile Hotel

☐ Yes, I WILL be attending the networking function OR

☐ No, I WILL NOT be attending the networking function

☐ Yes, I require additional tickets for the networking function at $80 per person

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

Dietary requirements:

2 Delegate contact details

Member no.:

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

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms Date of birth: DD/MM/YYYY

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

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

JOIN TODAY

*Become a member and save!

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

- save over $215 on Affiliate membership on the first 12 months
- access member-only prices to this and future events
- access all member-only technical resources.

Find out more about membership at taxinstitute.com.au/membership.

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

Signature:

Date of signature: DD/MM/YYYY

26-036EVT_07/26

3 Payment summary

Registration fees	$
Additional guest tickets – Networking function ($80 each)	$
Total payable	$

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)

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