The Tax Institute

National Superannuation **Conference**

22-23 Oct 2026 | CPD 13

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

Jemma Sanderson, CTA, Cooper Partners Financial Services & Chair, Conference Organising Committee
Phil Broderick, CTA, Sladen Legal
Daniel Butler, CTA, DBA Lawyers
Michele Carmody, Colonial First State
Dinh Dinh Dang, Deloitte
Nidal Danoun, Prosperity Financial Services
Marco Feltrin, PwC
Jeremy Geale, CTA, MinterEllison
Brad Ivens, ATI, EY
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Belinda Piffl, ATI, LBK Advisory
Shirley Schaefer, BDO

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Register on or before Friday 25 September to save!

Welcome

On behalf of The Tax Institute and the Organising Committee, it is my pleasure to invite you to attend this year's National Superannuation Conference, to be held as an in-person event at the W Melbourne on 22 and 23 October 2026.

Now in its 14th year, the conference has long been recognised as the premier event for tax specialists in the superannuation industry, uniquely dealing with the tax issues impacting both the large fund and self-managed superannuation fund sectors.

Our National Superannuation Conference has always been at the cutting edge of the issues facing the industry today and into the future, providing insights and diverse perspectives, to ensure our attendees stay on top of all the latest developments in superannuation, particularly where they relate to tax.

It's been another eventful year with numerous changes to digest. Some of these are superannuation tax-specific whereas others are broader taxation or superannuation regulatory and industry developments – all of this in an environment of ongoing economic and geopolitical uncertainty.

This year's program will again bring together regulators and leading practitioners from the legal, accounting, audit and financial advisory services fields of the superannuation industry. Over two full days they will explore a myriad of tax-related challenges impacting the superannuation system, and the opportunities that these might present. The line-up of speakers includes leading superannuation and tax experts with the essential blend of knowledge and experience in the practical application of the laws. A mixture of plenary sessions and two streams of breakout sessions on the large fund sector and SMSF sector are offered. Delegates can pick and choose breakout sessions from either stream, including the newly introduced workshop session for the SMSF stream.

In addition to the outstanding technical content, the program has been designed to also enable you to network and relax with colleagues and peers, and conference registration includes attendance at the networking function being held at the WET bar on Thursday 22 October.

I encourage you to register your attendance on or before Friday 25 September to receive the early bird discount and ensure your place.

Finally, I would like to take the opportunity to thank the organising committee for their hard work in putting this exceptional program together.

I look forward to seeing you there.

Jemma Sanderson, CTA, Cooper Partners Financial Services
Chair, Conference Organising Committee

Technical program

Day 1 Thursday, 22 October 2026

<table>
<tr><th>Time AEDT</th><th colspan="2">Session</th></tr>
<tr><td>8:00 – 8:30am</td><td colspan="2">Registration</td></tr>
<tr><td>8:30 – 8:45am</td><td colspan="2">Welcome and President’s Address
Speakers: Jemma Sanderson, CTA, Conference Organising Committee Chair, Tim Sandow, CTA, President, The Tax Institute</td></tr>
<tr><td>8:45 – 9:30am</td><td colspan="2">Session 1: Geopolitical Update
Speaker: Jon Berry, KPMG
This session will provide a timely update examining the geopolitical and market forces shaping the outlook for Australia’s superannuation sector.</td></tr>
<tr><td>9:30 – 10:00am</td><td colspan="2">Morning tea</td></tr>
<tr><td></td><td>Large Fund Stream</td><td>SMSF Stream</td></tr>
<tr><td>10:00 – 11:00am</td><td>Session 2A: Emerging Issues for Large Funds
Speaker: Dinh Dinh Dang, Deloitte
This session will examine a series of developing and anticipated domestic tax issues impacting the large superannuation fund sector.</td><td>Session 2B: Post 2026 Budget – Are SMSFs the Best, Chuck out the Rest?
Speaker: Phil Broderick, CTA, Sladen Legal
With the introduction of Div 296, advisers were starting to think that the time for SMSFs was over and other investment vehicles may be preferred. Well, the proposed changes in the 2026 federal Budget have sure thrown a spanner in that thinking. In this session, Phil Broderick will compare SMSFs (including Div 296) with other investment vehicles post the proposed Budget changes, including:
• SMSFs v companies;
• SMSFs v trusts (fixed, unit, hybrid and discretionary);
• SMSFs v partnerships; and
• SMSFs v natural persons.</td></tr>
<tr><td>11:00am – 12:00pm</td><td>Session 3A: ATO Update
Speaker: Australian Taxation Office Rep
In this session, the ATO will provide an update on current industry focus areas for large funds.
The presentation will be followed by a facilitated Q&A.</td><td>Session 3B: Workshop – Division 296 – Part One
Speaker: Jemma Sanderson, CTA, Cooper Partners Financial Services
This two-part workshop is designed to provide a practical and technical understanding of the proposed Division 296 measures and their implications for high-balance superannuation members.
Part one of this topical session will be an up-to-date look at the new provisions that apply from 1 July 2026 and how they will impact your clients.</td></tr>
<tr><td>12:00 – 1:00pm</td><td colspan="2">Lunch</td></tr>
</table>

Technical program

Day 1 Thursday, 22 October 2026 continued

Time AEDT	Large Fund Stream	SMSF Stream
1:00 – 2:00pm	**Session 4A: Climbing to Stage 3 – The Tax Governance Journey for Large Super Funds** **Speaker: Chris Vanderkley, CTA, PwC** Tax governance has moved from a back-office compliance discipline to a board-level imperative for large superannuation funds. Trustees retain the legal responsibility for the accuracy of fund returns even where tax data, calculation engines and tax reporting are outsourced to custodians, administrators, investment managers and other third parties. The ATO has progressively reinforced this expectation through its top 1,000 combined assurance review program for large funds, the tax risk management and governance review guide, and the supplementary governance over third-party data guide directed specifically at large superannuation funds, managed funds and insurance companies. This session will distil the latest ATO guidance and provide a practical roadmap for funds seeking to move to a Stage 3 rating across both their core income tax control framework and their third-party data tax control framework. The session will draw on the ATO's published expectations, observations from recent combined assurance reviews and practical experience assisting trustees to uplift their tax governance frameworks.	**Session 4B: Workshop – Division 296 – Part Two** **Speaker: Jemma Sanderson, CTA, Cooper Partners Financial Services** Part two of this session will focus on providing examples of the calculations and their impact. The outcome of the session will be the impact for your clients and action items to take in the 2026/2027 year.

Technical program

Day 1 Thursday, 22 October 2026 continued

Time AEDT	Large Fund Stream	SMSF Stream

2:00 – 3:00pm	**Session 5A: Budget Outcomes – Capital Gains Tax Changes and the Impact on Large Superannuation Funds**
	Speakers: Siew-Kee Chen, CTA, Deloitte, Vivienne Collins, Northern Trust, Lily Li, AustralianSuper
	
	Recent Budget announcements proposing changes to the capital gains tax regime have the potential to significantly affect investment structures, reporting obligations and tax outcomes for large superannuation funds and the industry.
	
	This session will examine the proposed shift to an indexed capital gains framework and explore the practical implications for funds investing directly and through complex trust and managed investment structures.
		Session 5B: GST and Super Funds
		Speaker: Ken Fehily, CTA, Fehily Advisory
		
		This session will cut through the myths and provide up-to-date coverage on GST and SMSFs, and will cover:
		• Why some think that SMSFs can't or shouldn't register for GST;
		• Any special GST rules for super funds, especially SMSFs;
		• The GST implications for Trustees of super funds;
		• GST for SMSFs that only have securities, shares and cash;
		• Some of the fundamental GST rules for SMSFs;
		• The key practical GST rules relating to property including:
		  • Impact on new residential premises;
		  • Commercial and business real property;
		  • Selling or acquiring GST-free going concerns; and
		• Practical case studies about the above.

3:00 – 3:30pm	**Afternoon tea**	

Technical program

Day 1 Thursday, 22 October 2026 continued

Time AEDT	Large Fund Stream	SMSF Stream
3:30 – 4:15pm	**Session 6A: Property Update for Large Funds – Navigating Tax, Structuring and Emerging Investment Opportunities** Speakers: Jennifer Kwok, KPMG, Jacqueline Wood, CTA, KPMG Property remains a key asset class for superannuation funds, but the regulatory and tax landscape continues to evolve. This session will provide a timely update on the latest developments affecting property investment by large funds, including state tax reforms and emerging tax issues impacting property transactions and ownership structures.	**Session 6B: ATO Update** Speakers: Ben Kelly, Australian Taxation Office, Shirley Schaefer, BDO The ATO seems to have two centres of focus at the moment: illegal early access and Non-Arms-Length Income. In this session you will hear from the ATO about their latest activities and outcomes in these areas, including: • Illegal early access statistics; • What happens when illegal access is detected; • What types of penalties and tax are being imposed; • Whether Voluntary Disclosure impacts the penalties or tax imposed in these situations; and • Prohibited loans.
4:15 – 5:15pm	**Session 7: Cases Update** Speaker: To be confirmed This session will look at a number of recent cases that are important to the superannuation industry and will identify matters that warrant consideration by trustees and advisers.	
From 5:15pm	**Networking function**	

Conference Networking Function

Join your colleagues and conference speakers as you soak up Melbourne's skyline poolside at our WET deck.

Date: Thursday, 22 October 2026

Time: From 5:15pm

Venue: WET deck | W Melbourne

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

Dress: Business or business casual

Technical program

Day 2 Friday, 23 October 2026

Time AEDT	Session	
8:45 – 9:30am	**Session 8: Tax Policy and Advocacy Update** Speaker: Julie Abdalla, FTI, The Tax Institute	
9:30 – 10:30am	**Session 9: Hot off The Press – Marsh CFA Institute Global Pension Index** Speaker: Tim Jenkins, Mercer This session will provide a timely overview of the latest findings from the Marsh CFA Institute Global Pension Index, offering fresh insights into global pension system performance and key trends shaping retirement income systems worldwide. Formerly published as the Mercer Global Pension Index, the report continues to benchmark sustainability, adequacy and integrity across leading pension systems. This session will unpack the latest results, highlight key shifts in rankings and policy developments, and explore what the findings mean for Australia's superannuation system in a global context.	
10:30 – 11:00am	**Morning tea**	
	Large Fund Stream	**SMSF Stream**
11:00am – 12:00pm	**Session 10A: Division 296 – Practical Challenges and Considerations** Panellists: Darius Lalkaka, CTA, HESTA, Cath Watson, EY Facilitator: Brad Ivens, ATI, EY The panel will examine how Div 296 may be managed in a large fund environment, including the practical challenges of identifying affected members, administering outcomes across diverse membership cohorts, and communicating complex tax concepts in a clear and equitable manner. The session will also consider broader questions of fairness and equity, including the allocation of costs, treatment of members with different investment options and circumstances, and the role funds may play in assisting members to understand and respond to the changes.	**Session 10B: Tax Implications for Property In, During and Out of SMSFs and the Impact of Recent Reforms** Speaker: Daniel Butler, CTA, DBA Lawyers SMSFs have a penchant for investment in property and get involved with all sorts of transactions, including investing in commercial, residential and farming property, developing/improving/ leasing property and entering into a range of other transactions here and overseas. Just under 20% of SMSF assets are held in residential and commercial property. This session will cover: • The key tax and superannuation drivers relating to property in view of the May 2026 Budget changes; • Structuring property via JVs and other entities, including companies and unit trusts; • How the minimum 30% tax will impact SMSF investments in trusts from 1 July 2028; • Whether SMSFs can borrow to invest in residential property after the LRBA changes on 10 August 2026; • The ATO focus areas on property, including SISA and ITAA considerations; • A brief review of where we are at with NALI; and • Much more …

Technical program

Day 2 Friday, 23 October 2026 continued

<table>
<tr><th>Time AEDT</th><th>Large Fund Stream</th><th>SMSF Stream</th></tr>
<tr><td>12:00–1:00pm</td><td>Session 11A: Foreign Investments – Emerging Issues Across the Investment Lifecycle
Speaker: James Chun, KPMG

This session will explore the evolving tax issues arising across the lifecycle of foreign investments by superannuation funds, from initial structuring through to ongoing management and exit. It will consider a range of developing issues that, while often technical or nuanced, are increasingly coming to the forefront, such as the impact of the changes on the thin capitalisation rules.

The session will also consider what good governance looks like through each step of the investment lifecycle in accordance with evolving ATO expectations.</td><td>Session 11B: Tax-Effective Benefit and Pension Payments
Speaker: Mark Ellem, Accurium

This session will explore key considerations in managing tax-effective benefit strategies and pension payments within SMSFs, with a focus on balancing member outcomes and compliance obligations. The discussion will examine how tax applies both at the fund level and at the benefit payment stage, including the treatment of death benefits tax and the implications for beneficiaries.

The session will also include consideration of the ongoing relevance and complexity of legacy pensions within SMSFs.</td></tr>
<tr><td>1:00–2:00pm</td><td>Lunch</td><td></td></tr>
<tr><td>2:00–3:00pm</td><td>Session 12A: Harnessing AI in the In-house Superannuation Tax Function – Driving Efficiency, Insight and Value
Speakers: Theo Denovan, PwC, Tristan Tan, CTA, IFM Investors

Every in-house super tax team is being asked to do more with AI and to prove it stands up to scrutiny. Combining a practitioner’s lens with a builder’s perspective, this session gets past the hype to focus on three things: where AI can deliver measurable efficiency, how AI can unlock new forms of insight for the business, and where the risks (regulatory, ethical and operational) demand careful design.</td><td>Session 12B: AI in Practice for SMSFs
Speakers: Daniel Smedley, CTA, Sladen Legal, Daniel Sneider, BDO, Louis Razuki, Lituus Studio

As AI tools continue to reshape professional practice, this practical panel session will explore how firms are using AI to improve efficiency, manage risk and support their teams.

Representatives from three firms will share their experiences and will discuss:
• Common pitfalls to avoid and the information that should never be entered into AI tools;
• The AI platforms firms are using and the reasons behind their choices;
• Practical efficiencies, pros and cons, and tips from real-world implementation;
• Future trends and AI investment priorities; and
• If they could do it again, what they would change about their AI implementation journey.</td></tr>
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Technical program

Day 2 Friday, 23 October 2026 continued

Time AEDT	Session
3:00 – 3:30pm	Afternoon tea
3:30 – 4:30pm	**Session 13: Cyber Security in Superannuation – Managing Emerging Threats and Protecting Member Trust** Speaker: Punnen Syriac, Deloitte Cyber security threats continue to evolve in sophistication and scale, presenting significant challenges for superannuation funds and their members. This session will examine the current threat landscape facing the sector, including recent attacks targeting large funds and incidents involving member fraud and identity compromise.
4:30pm	Conference Close

Presenters

Julie Abdalla, FTI, is the Head of Tax & Legal at The Tax Institute. Julie has practiced in the tax teams of Big 4 and top tier law firms in Sydney and Melbourne, and at an international law firm in London. She has expertise in law and policy across a broad range of taxes and industry sectors. Julie is driven to achieve holistic tax reform, and has the depth of knowledge to advocate for members and the betterment of the tax system. Julie leads the Tax Policy & Advocacy team and has oversight of The Tax Institute's National Technical and State Taxes Committees comprised of over 150 volunteers. She represents The Tax Institutes in several external forums including the ATO's National Tax Liaison Group and the Australian Treasury's Tax Treaty Advisory Panel. Julie provides strategic and technical advice to Government and other stakeholders, and has appeared as an expert witness in several Senate Committee inquiries. Julie has been recognised throughout the profession for her leadership and excellence in tax. She has been awarded a number of scholarships and awards including the International Bar Association Taxes Committee Scholarship, the Australian Lawyers Weekly 30 Under 30 Award in Tax, and a prize from the University of Oxford. Julie holds a Bachelor of Arts and a Juris Doctor from the University of Sydney, and a Master of Laws from the University of Melbourne, part of which was completed at the University of Oxford.

Jon Berry is the Geopolitical Lead for KPMG Australia. As an experienced international trade, investment and geopolitical analyst, Jon provides analysis and advice for businesses seeking to understand how geopolitical risks and opportunities impact their operations and ambitions. Jon has had a varied 20-year career including roles in Australia, China, Japan, France, Italy, Africa, Switzerland and India. He worked for 10 years as a Melbourne-based trade policy consultant, advising most of Australia's largest export industries, and representing their interests in Canberra and at international cooperation fora. From 2008 to 2010, Jon worked within the UN system, as a food aid logistics officer for the World Food Programme. This role involved frequent missions to Africa and the Middle East where he saw firsthand both the challenges and opportunities represented by international trade, and the geopolitical forces that shape and influence the decisions of governments.

Phil Broderick, CTA, is a principal of Sladen Legal and heads its superannuation team. He is member of a number of superannuation related committees, including being a member and the former chair of The Tax Institute's superannuation committee and director and chair of the Institute of Financial Professionals Australia technical and policy committee.
He is also a member of the ATO's Superannuation Industry Stewardship Group. Phil is also heavily involved in liaising with Treasury and the ATO in relation to the implementation of new superannuation laws and administrative practices. Phil's areas of practice include superannuation, duties and state taxes, estate planning and succession, trusts, federal tax and business structuring. Phil was listed in the 2020 to 2026 Best Lawyers Australia for superannuation law and in 2026 for tax law; was recommended in Doyles' leading Victorian tax lawyers for 2021 and 2023; and was the winner of the SMSF Association's SMSF Specialist Advisor (SSA) Top Achiever Award in 2019.

Daniel Butler, CTA, is one of Australia's leading SMSF lawyers and has worked predominantly in the SMSF, tax and related fields for over 40 years. He is a regular presenter on SMSF topics and has published extensively in professional journals, including contributing a monthly article on SMSFs to the Taxation in Australia and other media. Dan is a member of The Tax Institute's National Superannuation Technical Committee and is involved with a number of other tax and SMSF committees and discussion groups. Dan also presents on the subject Taxation of Superannuation at the University of Melbourne's Master of Laws/Tax program. Dan is also a Specialist SMSF Advisor.

Siew-Kee Chen, CTA, is a Partner at Deloitte. He is the Deloitte Asia Pacific Regional Tax & Legal Leader for Investment Management. Siew-Kee is recognised as a leading tax adviser in investment management. Siew-Kee has over 27 years' experience providing tax advisory services to financial services, real estate, private equity and superannuation clients, and advising throughout the entire deal life cycle, including mergers and acquisitions, due diligence, tax compliance and divestments. He delivers practical and commercial expertise to clients, drawing from his previous role as the Head of Tax of an Australian listed group. Siew-Kee has been heavily involved in the tax reform design for Management Investment Trusts, CCIVs and Financial Services.

James Chun is an experienced tax professional advising clients across the superannuation, property and funds management sectors with a strong focus on offshore investments.

Presenters

Vivienne Collins is a tax professional with over 20 years in the financial services industry, including positions with the Big 4, asset managers and custodians. Vivienne qualified as a Chartered Accountant before pursuing roles in financial services in Asia, Europe, the UK and Australia. She is currently Senior Product Manager of Tax at Northern Trust where she is responsible for tax solutions and strategic direction. She is committed to facilitating communications about tax product directions and developments, and making tax engaging.

Dinh Dinh Dang is a Tax Partner with Deloitte in Melbourne, specialising in the financial services industry. She advises superannuation funds and investment managers about all parts of the wealth value chain, from the investment vehicles to the superannuation funds which invests into these, as well as member impacts. She provides tax advice on inbound, outbound and domestic investment and structuring, as well as on superannuation and trust specific issues. Dinh Dinh also has broad experience assisting clients in their interactions with the Australian Taxation Office including with the top 1000 reviews and other products.

Theo Denovan is a partner at PwC Australia in the tax technology team, focusing on leveraging artificial intelligence to build products and software for PwC and its clients. As Chief Information Officer for Tax & Legal, Theo helps to create bespoke AI-driven tools tailored to meet the unique challenges of clients. Theo manages a team of software engineers and data scientists, committed to delivering innovative digital products and services. These solutions help reshape the way organisations approach their operational challenges, enabling them to thrive in an increasingly digital world.

Mark Ellem is a popular, experienced and highly sought after presenter who is passionate about educating accountants and SMSF practitioners about SMSFs and strategies to make SMSFs a successful part of their business. Mark has extensive experience in Self-Managed Superannuation Funds (SMSFs), pension funds, Income Tax and Financial advisory. He is a Fellow of the CPA, IPA and SMSF Association, and received the 2018 SMSF Association CEO award in February 2019 for his contribution to the association and was in the inaugural group of association members to advance to the status of Fellow in February 2020. Along with Mark's regular appearances presenting at national SMSF conferences, he also heads up Accurium's online education and presents webinars and web classes to provide an online interactive learning experience providing CPD hours. He regularly composes content, FAQs and CPD assessments for the Accurium TechHub. He provides in-house training to a number of organisations and can provide bespoke training to suit the needs of your organisation. Mark frequently delivers editorial contributions and provides comment for the media and has been featured in popular trade media including selfmanaged superannuation and SMSF Adviser. He has spent over 30 years in accounting practices and SMSF administration companies, including running his own accountancy practice and SMSF administration and compliance advice company for ten years. Mark is a member of the Austin Motor Vehicle Club of Queensland and enjoys driving his classic Austin cars, a 1968 Austin 1800 Mk1 and a 1955 Austin A50 Cambridge, when they're running, and working on them (when they're not).

Ken Fehily, CTA, is the Director of Fehily Advisory, with over 25 years' experience specialising in all and anything to do with GST. That includes property, tax audits and reviews, debts and penalties, binding private rulings, classifications, SMSFs, cross-border transactions and concessions like margin scheme, going concerns and retrospective compliance. After serving on the Treasurer's GST Technical Advisory Committee that developed and wrote the GST laws, Ken has served on the GST Rulings Panel and the ATO GST Stewardship Group. Ken is a Fellow of CA ANZ and CPA Australia, Registered Tax Agent as well as a Chartered Tax Adviser with The Tax Institute. He regularly sits on or advises boards and committees of industry bodies, private businesses and NFPs.

Brad Ivens, ATI, is an Associate Partner in EY's Financial Services tax practice, focussing on wealth and asset management including superannuation funds and managed funds. In particular, Brad has over 20 years' experience in providing tax compliance and advisory services for the superannuation industry, covering matters such as investment due diligence, capital gains tax planning, unit pricing/crediting rate reviews, custodian tax reporting, fund administration, tax effect accounting, tax governance and ATO reviews/audits. His clients have ranged from some of Australia's largest industry and retail funds, through to public sector and employer-sponsored funds. Brad has also been an active contributor to the government and the ATO in relation to various superannuation tax issues and reforms.

Presenters

Tim Jenkins is Partner and Superannuation Consulting Leader with Mercer Australia and recognised expert in superannuation and a qualified actuary. Tim has a deep expertise in superannuation, retirement and group insurance and brings extensive experience helping superannuation funds enhance their strategies, governance, products and member services. Tim has a strong track record supporting industry transformation, including fund mergers and successor fund transfers and is actively engaged in public policy, driven by a commitment to improve superannuation member outcomes.

Ben Kelly is the Deputy Commissioner of Superannuation & Employer Obligations (SEO) within the Australian Taxation Office. He recently joined SEO after four years in the role of Deputy Commissioner, Policy, Analysis & Legislation in the ATO's Law Design & Practice Group. Prior to commencing in the Deputy Commissioner PAL role, Ben worked in a variety of legislation development, law interpretation and operations roles across the ATO, as well as being seconded to Treasury's Law Design Practice. Ben has also worked in ATO enabling and corporate roles, including being the ATO's Chief Risk Officer and Chief Internal Auditor. After completing a combined Bachelor of Economics and Bachelor of Laws (with Honours) degree at the Australian National University, Ben joined the ATO as a graduate in 1995 and has remained with the organisation ever since. Ben also holds a Masters in Sport Management from Deakin University.

Jennifer Kwok is a Partner at KPMG Australia with over 20 years' experience advising superannuation funds, sovereign wealth funds, asset managers and other institutional investors, with a particular focus on the real estate and funds management sectors. She advises clients throughout the investment lifecycle, including acquisitions, fund structuring, asset holding and exits. Jennifer has advised on a broad range of property transactions involving commercial, logistics, retail, residential and data centre investments. She is a frequent speaker at industry conferences and regularly advises clients on the practical implications of Australian tax reforms and policy developments affecting real estate investment and institutional investment structures.

Darius Lalkaka, CTA, is the General Manager, Taxation at HESTA an Industry Superannuation Fund managing approx. $68 billion of assets for members in the Health and Community Sector. Darius has over 16 years' experience in the financial services sector, with most of this experience being within the superannuation industry. His experience spans across tax governance, risk management, investment due diligence, Trustee tax, custodian/administrator tax reporting, member tax and administration matters. At HESTA, Darius has designed and internalised the tax function and today leads a high performing tax team.

Lily Li is the Senior Manager, Portfolio Tax at AustralianSuper and has more than 20 years of experience across the Big 4, banking, wealth management and superannuation industries. She is responsible for investment tax compliance, tax in crediting rate governance, third-party tax governance, withholding tax management and tax risk oversight across one of Australia's largest institutional investment portfolios. Lily is recognised for her expertise in investment taxation, tax governance and superannuation, and is passionate about using technology and AI to modernise tax functions and improve after-tax business outcomes.

Louis Razuki is the founder and principal of Lituus Studio, a Melbourne-based consultancy helping organisations become AI native — where AI is built into how a business operates, not just handed to staff as another tool. Louis works directly with leadership teams to design and build the systems, governance and infrastructure that let AI compound an organisation's knowledge and judgement over time. His approach is grounded in one filter: AI should make people more capable, not replace them. That thinking shapes every engagement, from professional services firms to construction and not-for-profit organisations. By the time of the conference, Louis will have led AI transformation work with a wide range of Australian businesses — giving him a practitioner's read on what's actually working inside firms adopting AI, and where the common pitfalls lie.

Jemma Sanderson, CTA, is a Director of Cooper Partners Financial Services, heading up their SMSF specialist services. Jemma provides strategic advice on SMSFs, estate planning and wealth management to clients, as well as technical support and consultancy to accounting, legal and financial planning groups. Jemma has over 25 years experience in developing complex strategies for high-net-worth clients. Jemma is a regular presenter on superannuation and SMSFs for the professional bodies across the country and is the author of The Tax Institute's popular publication, SMSF Guide, in its ninth edition. Jemma received the 2024 Community Service Award at The Tax Institute's Tax Summit for her contribution to The Tax Institute.

Presenters

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

Daniel Sneider is a Senior Manager in Business Services at BDO in Melbourne, advising family groups, small businesses, high net wealth individuals and not for profits on tax, accounting, and commercial matters. With an academic background and interest in philosophy, Daniel brings a practical lens to the role of technology in professional services. He is particularly interested in how AI can improve the quality, consistency and efficiency of outputs for tax advisers, not by replacing professional judgement, but by enhancing how advisers analyse information, communicate complexity and deliver better client outcomes.

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.

Punnen Syriac is a Partner in Deloitte's Cybersecurity practice. With nearly 20 years of experience, he advises superannuation funds, wealth and asset managers, and other regulated organisations across Australia on cyber and information security, digital identity and technology risk. He has led the delivery of large-scale cyber and identity programs in these environments, working with boards, trustees and executive teams to strengthen member data protection, cyber resilience, governance and regulatory compliance. Punnen's background spans the breadth of cyber security, with particular depth in digital identity, including Customer Identity Authentication and Verification, Workforce Identity Governance, and Privileged Access Management. His work increasingly focuses on the cyber, trust and access risks emerging as funds adopt AI, advanced analytics and automation, and on how trustees can govern those risks as the threat and regulatory landscape evolves.

Tristan Tan, CTA, (CA, JD) is a Commercial Associate Director at IFM Investors, a global institutional investment manager owned by industry superannuation funds. His career spans M&A tax advisory, through compliance, to the in-house tax function. Combining these experiences, Tristan works at the frontier of tax and AI, building systems to scale the capacity of in-house tax teams across the enterprise. He has built TaxCanvasPro, a structuring application that turns deep tax structuring knowledge into working software. He is also the domain expert behind Luna, Australia's first AI tax copilot, and an adviser to other startups. Tristan holds certifications across Anthropic, Google and Microsoft, has trained thousands of business professionals on practical AI use, and brings both a domain expert and builder's perspective to how in-house superannuation tax teams can adopt AI safely and scale enterprise value.

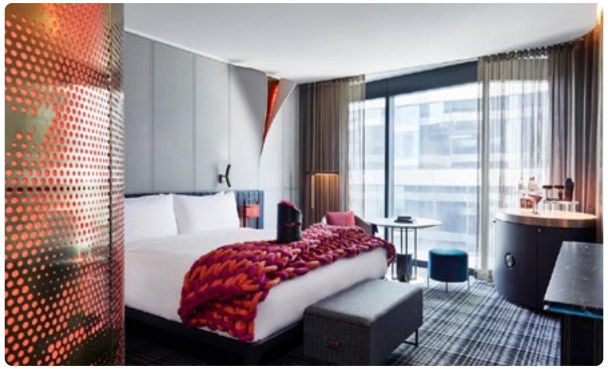
Chris Vanderkley, CTA, leads PwC's Tax Governance & Transparency Practice. He has assisted more that 350 of the firm's clients in implementing their tax governance framework and supported them with their ATO Top 1000 Streamlined/ Combined Assurance Reviews and their Top 100 Pre Compliance Reviews. Chris has 35 years' experience as a tax professional. Chris was the former Director of Tax at GE and acted as public officer of all of GE's GE entities. Chris was also the country CFO at GE and chaired most of GE's Boards. He frequently presents to Board Audit Committees and is a former director of the Board of Taxation.

Cath Watson is a qualified actuary in EY's Financial Services practice, with over 20 years of experience working across the Superannuation, Wealth Management and Life Insurance industries. Cath assists clients with unit pricing policies and processes within superannuation, including setting and monitoring tax estimates in unit pricing, broader monitoring of unit pricing, performing or reviewing remediation calculations to correct for unit pricing errors, and assisting with successor fund transfers.

Presenters

Jacqueline Wood, CTA, is a Principal Director at KPMG and works in the Deals 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 revenue authorities. Jacqueline has particular expertise in mergers and acquisitions, superannuation fund mergers, corporate restructuring and funds management. She is known, in particular, for her expertise in the financial services sector. She is a member of the Victorian State Revenue Office's State Taxes Consultative Council.

Venue and accommodation



W Melbourne

408 Flinders Lane, Melbourne, Victoria 3000

Melbourne's first luxury lifestyle hotel with its rebellious Flinders Lane address, W Melbourne takes its design cues from the streets of Australia's cultural capital. We hold the back-lane entrance keys to what's new/next in the city, revealing a playground where the early risers to the late-night revellers can turn up the tracks in this dynamic city. The joy of discovery is what underpins the design narrative at W Melbourne. Each space exhibits its own personality as the rawness of industry gives way to elegance and an array of sensory triggers that reveal unexpected delights.

Getting there

W Melbourne is approximately 10 minutes' walk from both Flinders Street and Southern Cross railway station.

Parking

To guarantee your parking space ahead of arrival, a valet fee of $100 per day applies. Guests who prefer to arrange parking on the day may do so, subject to availability, at $80 per day*. Please note that choosing not to secure parking in advance means availability cannot be guaranteed.

Electric vehicle chargers are also available for $45 per day.

*Subject to availability – same day parking is limited and offered on a first-come, first-served basis. The maximum vehicle height allowed is 2.2 metres.

Secure parking

522 Flinders Lane – open 7 days. For more information on availability and rates, click here.

300 Flinders Street – open 7 days. For more information on availability and rates, click here.

Accommodation

Favourable room rates have been negotiated and secured at W Melbourne. Accommodation bookings can be made by following the link here.

Please refer to the hotel booking conditions when booking your accommodation. All 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

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 13 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.

Networking function

A networking function will be held directly following the last session on Thursday from 5:15pm at WET deck, the indoor pool bar at W Melbourne. 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.

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.

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	Conference networking reception at WET deck*
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 25 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

National Superannuation Conference
Registration form

45209 | 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 18 for registration inclusions.

Full registration – 13 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before 25 September 2026	☐ $1,795	☐ $2,190	☐ $2,095
Standard registration Register after 25 September 2026	☐ $1,995	☐ $2,390	☐ $2,295

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

Networking function

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

Thursday, 22 October 2026 | WET deck – W Melbourne

☐ Yes, I WILL be attending the networking reception OR

☐ No, I WILL NOT be attending the networking reception

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

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

Dietary requirements:

*Become a member and save!

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

- save over $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

JOIN TODAY

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

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

3 Breakout session options

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

Thursday, 22 October 2026

10:00–11:00am	☐ Session 2A	☐ Session 2B
11:00am–12:00pm	☐ Session 3A	☐ Session 3B
1:00–2:00pm	☐ Session 5A	☐ Session 5B
3:30–4:15pm	☐ Session 6A	☐ Session 6B

Friday, 23 October 2026

11:00am–12:00pm	☐ Session 10A	☐ Session 10B
12:00–1:00pm	☐ Session 11A	☐ Session 11B
2:00–3:00pm	☐ Session 12A	☐ Session 12B

26-035EVT_07/26

4 Payment summary

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

5 Payment method

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

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

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

Name on card:

Card no.: Expiry date: MM/YY

Cardholder's signature:

For our refund, cancellation and replacement policy, visit taxinstitute.com.au/professional-development/event-policy.

For event enquiries, please contact the National Events Team on **1300 829 338** or nationalevents@taxinstitute.com.au

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

To register **Email** customeradmin@taxinstitute.com.au **Mail** Level 21, 60 Margaret Street, Sydney NSW 2000 **Online** taxinstitute.com.au

The Tax Institute

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