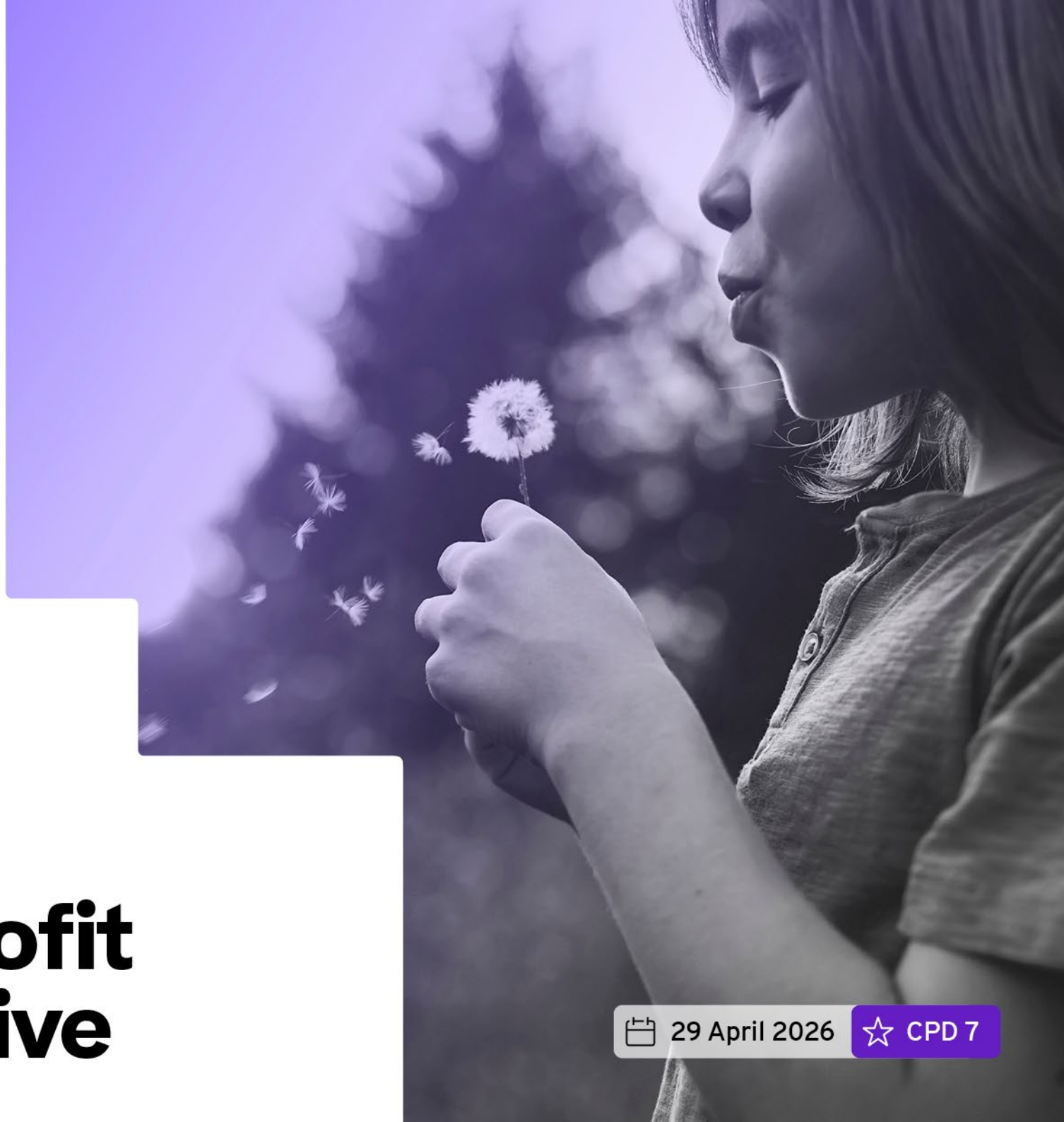


Not-for-Profit Tax Intensive

 29 April 2026

 CPD 7



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

Paul Banister, CTA, Grant Thornton, Chair, Not-for-Profit Tax Intensive Organising Committee

Todd Bromwich, Hall & Wilcox Lawyers

Kaylene Hubbard, ATI, KPMG

Morag Ingham, CTA, Findex

Rachel Vijayaraj, CTA, Brown Wright Stein Lawyers

Tom Wheeler, Assistant Commissioner for Not-for-Profits, Australian Taxation Office





Welcome

On behalf of The Tax Institute and the Not-for-Profit Tax Intensive Organising Committee, I am thrilled to invite you to the fourth Not-for-Profit Tax Intensive, to be held online on 29 April 2026.

Once again, the Intensive will be relevant whether not-for-profits and charities are your professional focus or part of a wider professional practice. The landscape continues to evolve, so this event should be on your “must attend” list.

Our outstanding line-up of speakers will focus on topics that balance navigating current and emerging NFP issues while also positioning organisations for the future.

Our popular Regulator Panel will again feature in 2026. It is always valuable to hear their perspective, and we will again hear from those at the coalface, where CEOs and NFP leaders share their insights.

The program includes:

- Prominent speakers
- Panel and technical sessions with an emphasis on real-world application
- Coverage of the breadth of tax issues relevant to charities and not-for-profits
- Opportunities to network and exchange ideas with peers and tax experts, including post-event drinks.

The Organising Committee wishes to thank all speakers for generously volunteering their time to share their knowledge and insights. I would also like to personally acknowledge the efforts of the Organising Committee and the staff of The Tax Institute. Without the commitment, support and creativity of this core group, we would not have the impressive program outlined in this brochure.

We look forward to seeing you at the fourth Not-for-Profit Tax Intensive.



A handwritten signature in black ink that reads "Paul Banister". The signature is written in a cursive, flowing style.

Paul Banister, CTA
Chair, Intensive Organising Committee

Early bird pricing offer
Register on or before Friday, 27 March to save!

Technical program

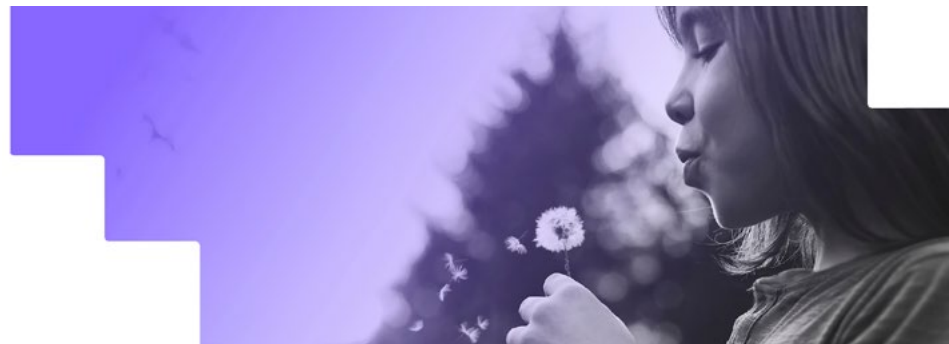
Wednesday, 29 April 2026

Time *AEST	Session
8:25 – 8:30am	Welcome and opening address
8:30 – 9:30am	<p>Session 1: Navigating Fundraising in the NFP Sector Speaker: Claire Jones, FTI, Prolegis Lawyers</p> <p>Charities and NFPs do not exist to make a profit for their members, but most need regular sources of income to fund the services they provide. In this session we will explore several ways organisations source their funding and the complex web of tax and legal compliance surrounding these activities, including:</p> <ul style="list-style-type: none">• The Commissioner’s views on member and benefactor programs• What is permissible in donor recognition and material benefits• Practical considerations of sponsorship arrangements• Regulatory considerations in running fundraising events• Tax implications of income streams from the provision of goods and services• Tax implications of government grants• Receiving distributions from trusts and bequests• Eligibility for refunds of franking credits.
9:30 – 10:30am	<p>Session 2: Engagement with the Regulators Panellists: Cate Bennett, ACNC, Marisa Hewitt, Australian Taxation Office, Facilitator: Tom Wheeler, Australian Taxation Office</p> <p>Hear practical insights into dealing with regulators, including how to identify compliance issues early and address them effectively. Panellists will share experiences, examine self-assessing income tax exemption and self-review processes, and discuss the challenges of transitioning between tax categories. The session will also highlight current focus areas, common traps for NFPs and best practice tips.</p>
10:30 – 11:00am	Delegate break
11:00am – 12:00pm	<p>Session 3: Issues with Employment Taxes: Employee vs Contractor Debate, Payroll Taxes and Superannuation Speaker: Dr Nick Gangemi, CTA, William Buck</p> <p>Managing ongoing employment compliance obligations is a complex task, with a range of tax and superannuation obligations to consider. This is made more challenging by recent changes to employment laws, ongoing developments in common law relating to payroll tax, and the continuing stress placed on the employee/contractor distinction. This session will take you through key issues to consider when structuring arrangements with your clients’ employees and contractors, how to manage instances of non-compliance that may arise, and issues specifically affecting charities and not-for-profits.</p>

Technical program

Wednesday, 29 April 2026 continued

Time *AEST	Session
12:00–1:00pm	<p>Session 4: Governance in For-Purpose Organisations Speaker: John Peacock AM, Associations Forum</p> <p>This session will explore the role of governance in achieving the mission of a not-for-profit organisation. It will cover the role of the board and the constitution, the importance of the board supporting the organisation's mission and strategic plan, director, responsible person, CEO and member obligations and responsibilities, and tips for best practice governance. This session will equip aspiring directors with the knowledge, focus and discipline to effectively contribute to the success of not-for-profit organisations.</p>
1:00–2:00pm	Delegate break
2:00–3:00pm	<p>Session 5: Art for Heart's Sake: Tax-Effective Pursuit of Your Passions and Philanthropy Speaker: Paul Banister, CTA, Grant Thornton</p> <p>Tax legislation contains special rules that better enable taxpayers to marry their passions with philanthropy. Whether these passions lie in cultural pursuits or other areas like conservation and heritage protection, special rules may provide tax benefits that enable more significant contributions. This session will explore:</p> <ul style="list-style-type: none">• Areas of interest• Approaches that do not qualify for tax benefits• Valuation rules for non-cash gifts• Treatment of gifts by co-owners• Special requirements that apply in particular areas• Interaction with other provisions.
3:00–3:30pm	Delegate break



Technical program

Wednesday, 29 April 2026 continued

Time *AEST	Session
3:30–4:30pm	<p>Session 6: Ancillary Funds Speaker: Jane Magor, Perpetual</p> <p>As ancillary funds look to transition into giving funds, we turn the spotlight onto these important philanthropic vehicles. This session will take us through:</p> <ul style="list-style-type: none">• Trends in ancillary funds and role of accountants and advisers• The key features of ancillary funds• An overview of governance, including who is a responsible person• Future directions and innovation in the fight for donations.
4:30–5:30pm	<p>Session 7: Industry Roundtable: Where to Next for the NFP Sector? Panellists: Neil Pharaoh, Tanck, Simon Rountree, Associations Forum, Scott Treatt, CTA, CEO, The Tax Institute</p> <p>This industry roundtable brings together leaders from charities, service-delivery organisations and large member-based not-for-profits to examine the future direction of the sector. Panellists will explore sector-wide challenges, including evolving funding, revenue and membership models, sustainability pressures and the changing nature of volunteer engagement.</p> <p>The discussion will also consider governance complexity, board capability, insights from the Productivity Commission and the strategic role of collaboration, mergers and organisational restructures in strengthening the sector. Drawing on perspectives from frontline charities and peak bodies alike, this session aims to provide a candid, practical conversation on the structural, strategic and leadership decisions shaping the next phase of the not-for-profit sector.</p>



Presenters

Paul Banister, CTA, is a Chartered Accountant and a Partner at Grant Thornton in their Private Enterprise team in Brisbane. He has over 40 years' experience working with clients in an array of industries to help them navigate through complex and potentially risky tax and commercial issues, including to address tax disputes. His expertise includes domestic and international tax planning, transaction advisory and support, superannuation structuring and advice, succession planning, estate planning and philanthropy. Paul has presented at many professional and business forums, both in Australia and internationally, and is a published author. Paul is the Vice President of The Tax Institute and was the recipient of The Tax Institute's SME Tax Adviser of the Year Award for 2016.

Cate Bennett is an experienced executive leader, having worked in a variety of legal, commercial and corporate enablement roles across the public and not-for-profit sectors over the last 15 years. Cate's work in the public sector started as a graduate rotating in the Victorian Departments of Health, Justice and Transport. She ultimately focused on commercial legal advice roles, and contract and service delivery management for key public infrastructure and new health service

developments, as well as transport services. Her experience in the not-for-profit sector includes working at Beyond Blue, and with the board of the Leukaemia Foundation on a pro bono basis. She served as the Global General Counsel and Company Secretary at Movember, which involved working with a large number of local and international regulators.

Dr. Nick Gangemi, CTA, is a Director in the Tax Division in William Buck Chartered Accountants. Dr. Nick's areas of expertise include corporate tax, international tax, indirect taxes such as payroll tax, tax litigation, high net worth individuals, trust law, and mergers and acquisitions. Prior to joining William Buck, Dr. Nick has worked in law and accounting firms and was for several years a member of the NSW Bar.

Marisa Hewitt is the Director of Risk and Strategy in the NFP and Government Experiences Branch at the Australian Taxation Office. Based in Melbourne, Marisa joined the public sector as a graduate and has built a 30-year career across the Australian Border Force and the ATO, moving into her current role in the NFP Branch five years ago. Marisa's career spans technical, client service, performance, and risk management roles, as well as work on new government

measures and business projects. An early whole-of-government project sparked a long-standing interest in public policy and project work. Marisa holds a Bachelor of Arts in Criminal Justice, a postgraduate qualification in Criminology, and a Master's degree in Public Policy. In a volunteer capacity, Marisa has served on NFP committees, coached junior sport, and completed three years as President of an AFL junior football club in 2023.

Jane Magor joined Perpetual in 2011 and is a philanthropic leader with significant experience and knowledge of the private wealth and the Australian not-for-profit sector. Jane leads a national team of philanthropy specialists who work in partnership with philanthropists to help guide them through the process of establishing a charitable Foundation or Endowment, formulate giving strategies and make compliant and vision aligned decisions regarding their annual grants to communities. Jane also works extensively with not-for-profit organisations across Australia to support them in building their capacity to deliver on their mission and demonstrate the outcomes of their work. Jane has a strong governance background, having completed a Bachelor of Business and is a Graduate of the Australian Institute of Company Directors.

Claire Jones, FTI, is a Special Counsel at Prolegis Lawyers, a legal practice that exclusively provides specialist legal services to charities, not-for-profit organisations, and philanthropy. At Prolegis Lawyers, Claire specialises in advising clients in matters of tax, structuring charities and not-for-profits, mergers and acquisitions, and corporate governance. Claire also has expertise in the establishment of structures for both public and private philanthropy. She is passionate about equipping the charities and not for profits sector by providing appropriate and practical legal solutions to enable organisations to focus on carrying out their mission. Claire is a Fellow of the Tax Institute and is passionate about enabling responsible stewardship, for good.

John Peacock AM, Chief Executive Officer, Associations Forum, is an experienced advisor to trade and professional bodies and is a thought leader for the associations and charities sector. John graduated with a B. Commerce from University of NSW and studied law. He has volunteered since high school and commenced his professional career and association management in 1989. He founded Associations Forum in 2004 which has become the largest network of associations in Australia.

Presenters

He founded Governology, an advisory firm specialising in the governance of associations and charities, in 2022 in Australia and expanded the firm to the UK in 2024. Governology is a law firm in Australia. John has trained and consulted to over a thousand associations and charities on governance, planning, operations, restructuring, events, membership and financial issues. He has written numerous articles on association matters and is publisher of Associations magazine, now in its 68th edition. John has spoken at association management events in 18 countries. John's work with associations was recognised in the 2021 Australia Day Honours List with his appointment by the Governor-General of Australia as a Member (AM) of the Order of Australia for significant service to the associations and not-for-profit sectors through a range of initiatives.

Scott Treatt, CTA, brings a wealth of experience in tax practice, tax administration, and leadership to the role of Chief Executive Officer of The Tax Institute. Scott's career as a Chartered Tax Advisor has spanned large and mid-tier professional firms and Government in technical and leadership roles. A dedicated member of The Tax Institute for over 20 years, Scott has contributed significantly to the knowledge of members and the

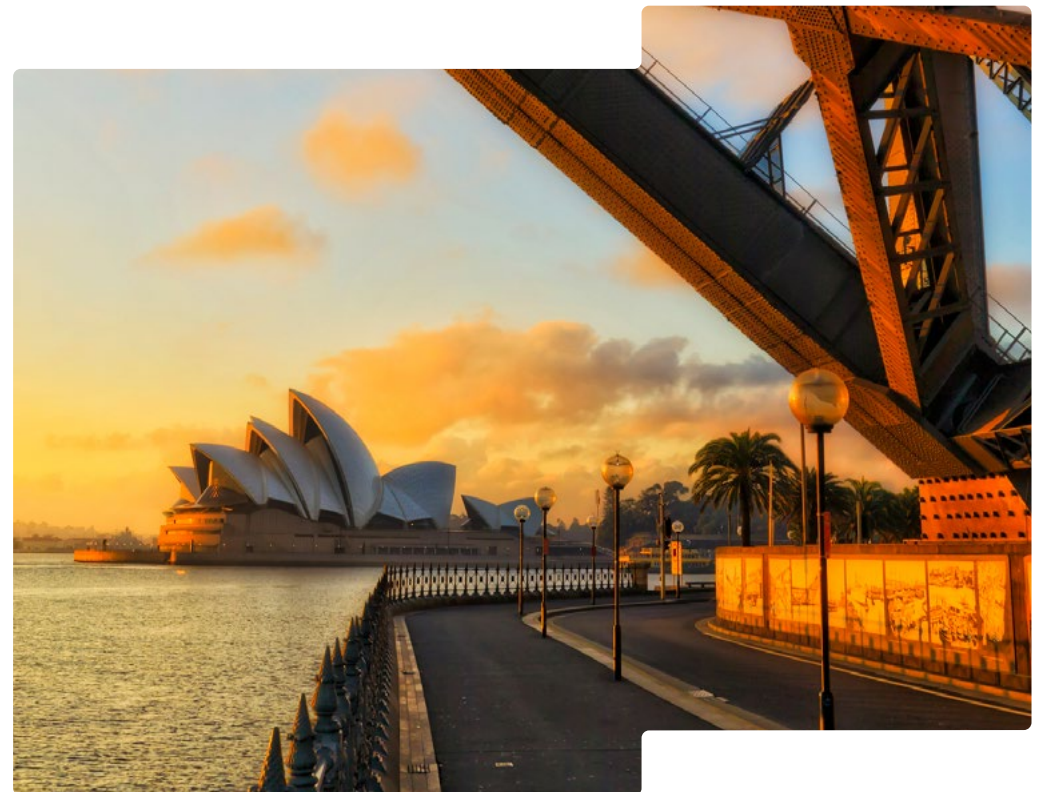
betterment of Australia's taxation and superannuation system overall. Scott was previously the General Manager, Tax Policy and Advocacy, at The Tax Institute, leading its tax technical team for three years. During this time, he proactively enhanced the team's capabilities, orchestrated a successful overhaul of the various committees and councils to improve the representation of our members, built strong relationships with key stakeholders across the industry, academia, and all levels of Government, and drove the Institute's growing influence in policy and advocacy circles. He is a passionate advocate for holistic tax policy reform and is a visionary business leader known for his forward-thinking approach.

A commitment to strategic cross-team collaboration, good governance, a strong dedication to member empowerment and development, and an unwavering pursuit of excellence in every aspect of the business characterises Scott's leadership style. Under Scott's guidance, The Tax Institute is poised to provide employees and members with clear guidance, adeptly turning challenges into opportunities and catalysing sustainable growth.

Simon Rountree has over 30 years leadership experience in the Not For Profit sector with 24 of those years

being the General Manager and/or CEO of Starlight Children's Foundation, Camp Quality and Tour de Cure. His extensive experience in growing businesses extends across governance, leadership, board development, cultural change, strategic and operational planning, revenue generation, risk, workplace wellbeing, volunteering and coaching. Simon has also developed and

implemented social enterprises aligned to the businesses purpose and mission whilst linked to commercial strategies in order to deliver growth and diversify revenue streams. His personal traits include being values based, a good listener, having clear communications without ambiguity and adopting a collaborative approach to achieving great results.



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 7 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. 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.

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

Online Full Registration

This registration option entitles one delegate to attend the entire event.



Discounts

Early bird registration

All registrations received and paid on or before Friday, 3 April 2026 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.

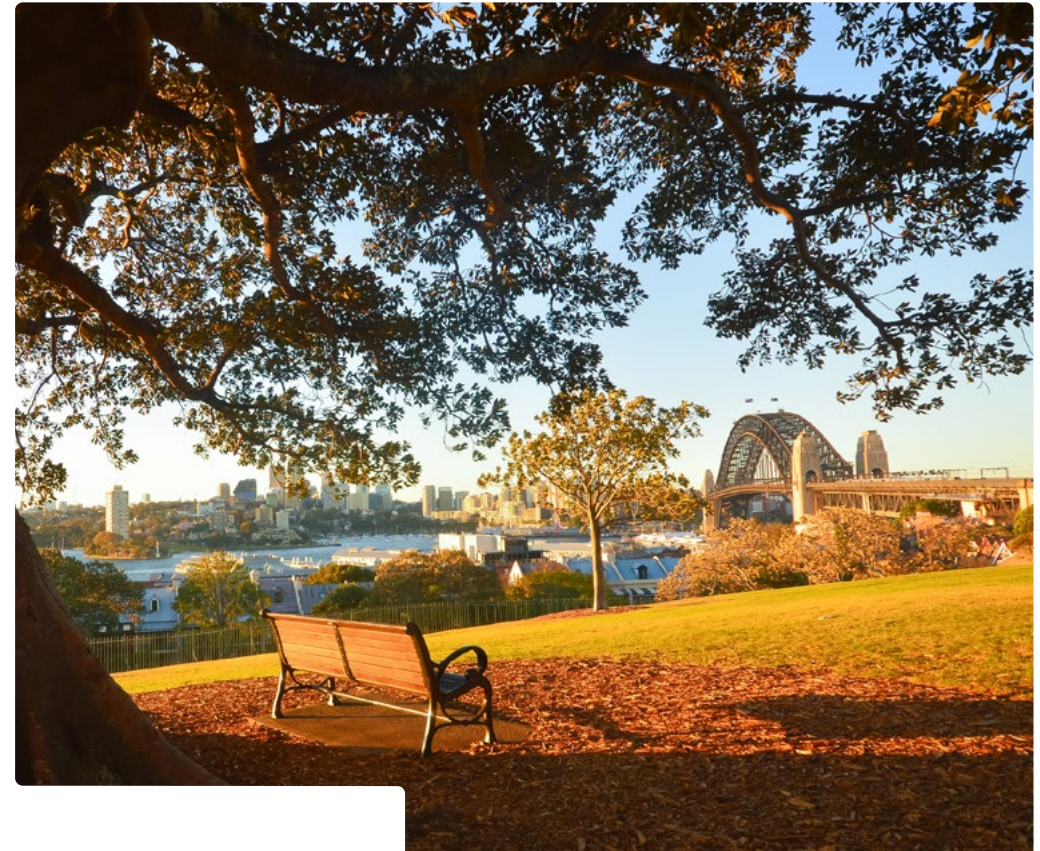
This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information, please contact the National Events Team on 1300 829 338 or nationalevents@taxinstitute.com.au.

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 10 for registration inclusions.

Online registration - 7 CPD hours

	Member	New member*	Non-member
Online Early bird registration Register on or before 27 March 2026	<input type="checkbox"/> \$845	<input type="checkbox"/> \$1,265	<input type="checkbox"/> \$1,145
Online Standard registration Register after 27 March 2026	<input type="checkbox"/> \$1,045	<input type="checkbox"/> \$1,465	<input type="checkbox"/> \$1,345

*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:

JOIN TODAY

3 Payment summary

Registration fees

\$

Total payable

\$

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

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

4 Payment method

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

Cheque payable to The Tax Institute (in Australian dollars)

Credit card Card type: AMEX Visa MasterCard Diners

Name on card:

Card no.:

Expiry date:

Cardholder's signature:

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

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





To register

Email customeradmin@taxinstitute.com.au

Mail Level 21, 60 Margaret Street, Sydney NSW 2000

Online taxinstitute.com.au

Join the conversation

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-  [facebook.com/thetaxinstitute](https://www.facebook.com/thetaxinstitute)
-  twitter.com/taxinstituteoz
-  [instagram.com/thetaxinstitute_](https://www.instagram.com/thetaxinstitute_)

