The Tax Institute

SA Tax Forum

5-6 Mar 2026 | CPD 13

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

Caitlin Ashworth, CTA, CCK Lawyers, Co-Chair, Forum Organising Committee
Joshua Pascale, Cowell Clarke, Co-Chair, Forum Organising Committee
Mitch Cramey, RSM Australia
Connor Eglinton, HWL Ebsworth Lawyers
Belinda Piffl, ATI, LBK Advisory
Ben Turner, FTI, Atlas Tax and Employment Tax Advisory
Nicholas Wilkins, CTA, Wilkins Advisory

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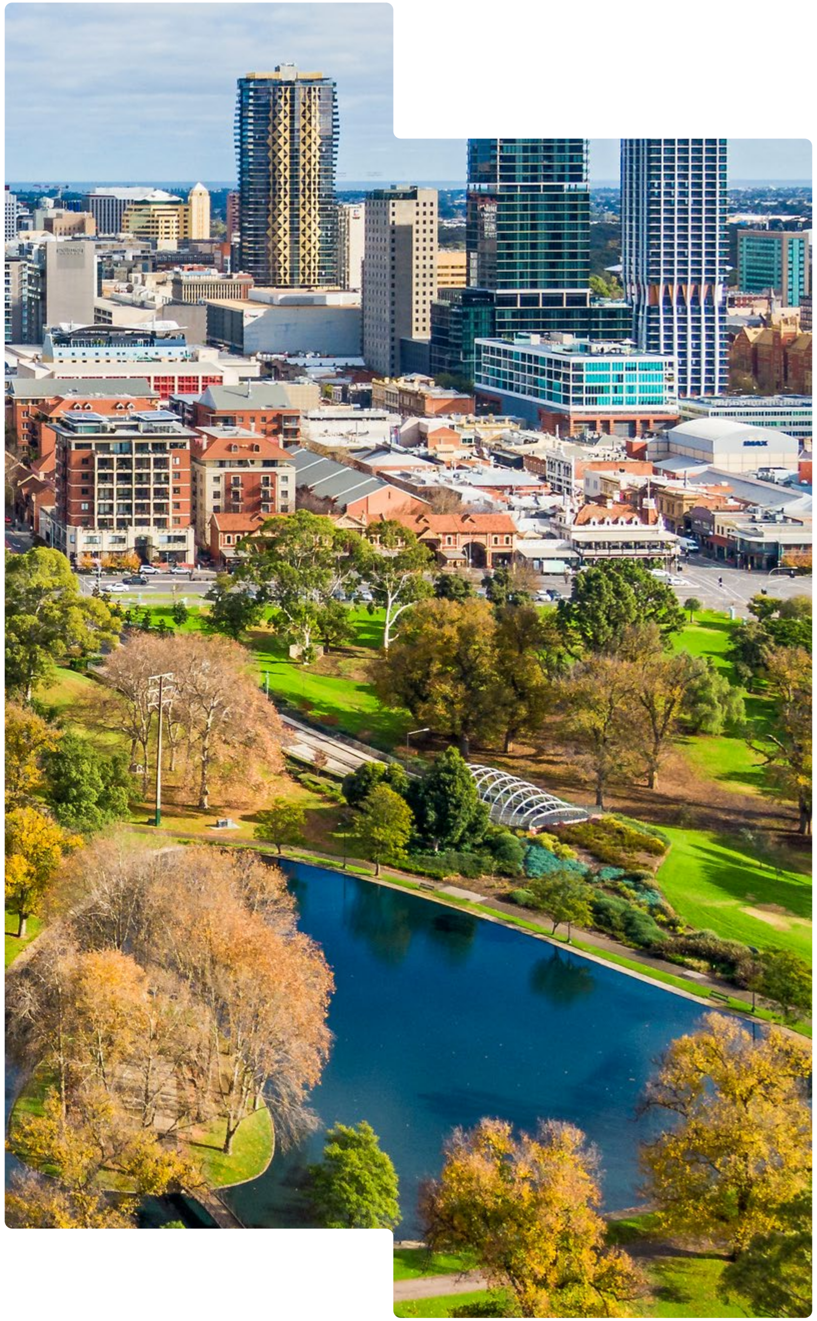


Welcome

On behalf of the organising committee and The Tax Institute, it is our pleasure to invite you to the SA Tax Forum, taking place on 5–6 March 2026 in Adelaide.

The Forum remains one of South Australia's premier events for tax professionals, offering an engaging mix of technical sessions, practical insights and valuable networking opportunities.

This year's program features an impressive line-up of local and interstate experts covering key issues including Division 7A, superannuation reforms, succession planning, ethics, AI in practice and more. Delegates will also benefit from two in-depth workshop sessions – exploring FTE Distribution Tax and Small Business Concessions – each providing practical takeaways you can apply directly to your work.

Join us for two days of learning, sharing and connecting with peers and leaders from across the profession.

The SA Tax Forum Program Committee wishes to take this opportunity to thank all our speakers, all of whom have generously agreed to volunteer their time to share with you their knowledge and insights.

Don't miss your chance to be part of the SA Tax Forum! We look forward to seeing you there.

Caitlin Ashworth, CTA
Co-Chair, Forum Organising Committee

Joshua Pascale
Co-Chair, Forum Organising Committee

Early bird pricing offer
Register on or before Friday, 6 February 2026 to save!

Technical program

Day 1 Thursday, 5 March 2026

Time *ACDT	Session
8:00 – 8:15am	**Registration**
8:15 – 8:30am	**Welcome and President's address** **Speakers: Josh Pascale, Cowell Clarke, Co-Chair, Forum Organising Committee, Tim Sandow, CTA, President of The Tax Institute**
8:30 – 9:30am	**Session 1: Division 7A – Current state of play** **Speaker: Michael Butler, CTA (Life), Finlayson** Division 7A prevents private companies from making tax-free distributions of profits to shareholders (or associates) by treating certain loans, payments and forgiven debts as deemed unfranked dividends. But despite being introduced in 1997, there is significant uncertainty on how and when its provisions will apply. Although the Full Federal Court confirmed in *Cmmr of Taxation v Bendel* [2025] FCAFC 15 that a corporate beneficiary's "*unpaid present entitlement*" (or UPE) is not a "loan" for Div. 7A purposes, the Commissioner has appealed to the High Court—and taxpayers and advisors remain in limbo until the Court has handed down its final decision. This session will: • Provide a refresher on the way Div. 7A operates, including the implications of complying loans, company-to-company loans, and loans via interposed trusts. • Examine issues raised by UPEs. • Review the Full Federal Court decision in Bendel and the High Court's ruling (if delivered before 5 March 2026). • Discuss whether there will be different outcomes following the High Court's decision, depending on whether the Court finds in favour of the taxpayer or the Commissioner. • Consider the ATO's existing Div. 7A guidance and Interim Decision Impact Statement. • Highlight issues with "legacy" UPE arrangements and sub-trust structures. • Explain key risk areas for practitioners, including the potential application of Subdivs. EA and EB, and sec. 100A; and • Time permitting, provide practical examples to illustrate compliant and non-compliant scenarios.
9:30 – 10:30am	**Session 2: Superannuation** **Speaker: Shirley Schaefer, BDO** As always the super goal posts just keep on moving. This session will cover some of the changes that will occur in the next 6 – 18 months: • Division 296 – How does it apply (practical calculations); • Division 296 – Are there any strategies that can be employed? • Payday Super – What do you need to know? and • Can we expect to see any other changes coming through.
10:30 – 11:00am	**Morning tea**

Technical program

Day 1 Thursday, 5 March 2026 continued

Time	Session
11:00am–12:00pm	**Session 3: Succession planning for family businesses – Tax & legal traps** Speaker: Christopher Annicchiarico, WRP Legal Succession planning is a critical issue for small and medium-sized enterprises, where business continuity and family wealth are often closely linked. This session examines practical strategies to manage the transfer of ownership and control, ensuring tax-effective outcomes and smooth transitions for the next generation.
12:00–1:00PM	**Workshop 1: Family Trust Elections – Distribution tax** Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers The rules about family trust elections, in particular who is part of the 'family group' and what are 'distributions', are quite complex and commonly misunderstood. A proper understanding of these rules is critical because distributions outside of the 'family group' could result in the family trust distribution tax being triggered. Family trust distribution tax, if triggered, is a debt that is not subject to a review period and for which the entity (which makes the distribution), together with the individuals who are directors or trustees, can be jointly liable. Therefore, it is important that advisers understand the concepts of 'family group' and 'distributions'. This workshop will provide practical examples of the common issues which practitioner will encounter including: • What are the implications of making a FTE or IEE; • When is a FTE or IEE required; • Requirement to make a valid FTE or IEE (including issues for testamentary trusts in meeting the 'family control' test); • What are 'distributions'; • Which individuals and entities are part of the 'family group'; • Who is liable for FTDT; • Passing control of trusts to the next generation; and • Case Study.

Technical program

Day 1 Thursday, 5 March 2026 continued

Time	Session
1:00 – 2:00pm	**Lunch**
2:00 – 3:00pm	**Workshop 1: Family Trust Elections – Distribution tax** **Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers** *Workshop 1 continued...*
3:00 – 3:30pm	**Afternoon tea**
3:30 – 4:30pm	**Session 4: Cross-border tax landmines and opportunities when selling Australian property** **Speaker: Ben Turner, FTI, Atlas Tax and Employment Tax Advisor** Selling Australian real estate when combined with periods of foreign tax residency presents unique CGT challenges. This session will unpack the main residence exemption with a focus on the absence rule and valuation reset under ss118-190 and 118-192, timing considerations, CGT discount eligibility, and key cost-base components. We'll also cover foreign-resident capital gains withholding including clearance certificates and variations, with a focus on common traps and practical tips to manage compliance risks.

Technical program

Day 1 Thursday, 5 March 2026 continued

Time	Session
4:30 – 5:30pm	**Session 5: How to practically implement AI in your firm** **Speaker: Adrian Cartland, Cartland Law** Adrian has been practising tax for 20 years and building legal AI for 10 years. This session will show you how you can readily implement the AI systems he uses in his own tax practice. This session draws on real-world systems and workflows to show how AI can be deployed effectively, securely, and profitably in a professional services environment. This session will cover: • How to build your own Retrieval Augmented Generation system that consistently produces work above the level of base models and eliminates hallucinations. • How I used AI to complete four years of accounts for 30 entities in a matter of weeks. • Managing privacy, privilege, and “shadow AI” use in your firm to ensure compliance while fostering safe innovation. • How to teach your staff to use AI effectively and why “play” is an important element to incorporate into firm culture; and • Why most AI implementations are failing and how to get widespread adoption and use in your firm. Attendees will leave with clear, practical steps to implement AI in their own firms, improving productivity and maintaining compliance with professional and ethical standards.
From 5:30pm	**Networking reception**

Networking reception

Join your colleagues, peers and our esteemed presenters for an evening of drinks, grazing platters and networking.

Date: Thursday, 5 March 2026
Time: From 5:30pm
Venue: Stamford Plaza Adelaide
Price: Inclusive for all full registration delegates
Additional tickets are $80 each – see registration form for details
Dress: Business or business casual

Technical program

Day 2 Friday, 6 March 2026

Time	Session
8:00 – 8:30am	**Registration**
8:30 – 9:30am	**Session 6: Tax Ombudsman update** **Speaker: Victoria Haffey, Deputy Tax Ombudsman** Join the Deputy Tax Ombudsman Complaints as she shares her perspective on improving the integrity and health of tax administration. This session will provide insights into current systemic issues under review and the Tax Ombudsman's approach to driving improvements across the system. Delegates will also have the opportunity to raise questions and discuss emerging concerns. Key discussion points include: • The evolving role and function of the Tax Ombudsman; • Priority areas and current systemic reviews; and • Perspectives on fairness, transparency, and good tax administration.
9:30 – 10:30am	**Session 7: Tax debts & insolvency – Practical pathways through a legal-ethics lens** **Speaker: Sylvia Villios, CTA, University of Adelaide** The ATO's firmer debt recovery posture, signalling use of the full suite of powers, tighter payment plans and interest remissions, and closer scrutiny of deferrals and penalties, has raised the stakes for advisers, directors and taxpayers. This session examines the operation of ATO powers under the Taxation Administration Act 1953 (Cth), including director penalty notices, garnishee notices and retention of refunds, and how those powers intersect with practical options such as payment arrangements, remission requests, small business restructuring, voluntary administration or a deed of company arrangement, liquidation and personal bankruptcy. Framed through a legal ethics lens, it focuses on delivering defensible advice and clear client communications across business and individual contexts. Key takeaways include: • Triage and act on DPNs within 21 days, distinguish lockdown and non-lockdown, and maintain a defensible advice trail. • Use ATO powers ethically and effectively, negotiate remissions and payment plans, and contest garnishee notices, retention of refunds and credit reporting where appropriate. • Select and justify the pathway that preserves value and reduces director exposure, including payment arrangements, small business restructuring, voluntary administration or a deed of company arrangement, liquidation or bankruptcy; and • Embed vulnerability safeguards and plain language communications so clients understand risks, costs and consequences.

Technical program

Day 2 Friday, 6 March 2026 continued

Time	Session
10:30–11:00am	**Morning tea**
11:00am–12:00pm	**Session 8: Stamp duty risks in commercial transactions** **Speakers: Amy Lancaster, Cowell Clarke, Josh Pascale, Cowell Clarke** In this session the presenters will cover the following: • Conveyances of real property and foreign purchaser surcharge duty; • Acquisitions of interests in landholders; • Trust deed amendments and changes of trustee; and • Comparison of State-by-State outcomes.
12:00–1:00pm	**Workshop 2: Small business CGT concessions – Restructuring for an exit event** **Speaker: Caitlin Ashworth, CTA, CCK Lawyers** This workshop explores the opportunities available to utilise the small business CGT concessions when restructuring or preparing for an exit event. Structure, timing and strategic use of the concessions and rollover provisions in Division 152 can position clients for better after-tax outcomes on sale. In an interactive format, delegates will work through a practical framework for guiding clients seeking to realise value and transition ownership of their business, whether through family succession planning or an exit to an unrelated buyer. In this workshop, the case study will cover: • Overview of the small business CGT concessions; • Key eligibility tests to check early; • Choosing between the 15-year exemption, retirement exemption and other options; • Trust and company considerations around ownership and control; • Sale preparation and structure basics and timing issues; • Documentation and evidence to support concession claims; and • Common mistakes that lose access and how to avoid them.
1:00–2:00pm	**Lunch**
2:00–3:00pm	**Workshop 2: Small business CGT concessions – Restructuring for an exit event** **Speaker: Caitlin Ashworth, CTA, CCK Lawyers** *Workshop 2 continued…*

Technical program

Day 2 Friday, 6 March 2026 continued

Time	Session
3:00–4:00pm	**Session 9: Tax effective liquidations – Structuring for the best outcome** **Speaker: Daniel Lopresti, Clifton Hall** This session explores the tax implications and practical considerations that arise in corporate liquidations. Our expert presenters will unpack key legislative provisions and judicial principles guiding the tax treatment of liquidation distributions, with a particular focus on section 47 and the Archer Brothers principle. Attendees will gain valuable insights into the interaction between liquidation events and the small business CGT concessions, as well as practical tips for managing accounting records, reserves, and shareholder loan accounts. Key discussion points include: • Tax treatment of liquidation distributions – section 47 and the Archer Brothers principle. • Practical issues surrounding accounting records and reserves. • Interaction between liquidation outcomes and small business CGT concessions. • Managing shareholder loan accounts and other complex issues; and • Case studies demonstrating tax-effective liquidation strategies.
4:00pm	**Forum close and afternoon tea**

Presenters

Christopher Annicchiarico is a Director at WRP Legal, who specialises in tax and commercial law. He is a member of the Tax Institute and holds a Master's degree in Taxation at the University of New South Wales. Chris advises clients ranging from, large corporations to SMEs and individuals, in all areas of taxation, stamp duty and revenue law as well as commercial, corporate and trust law. His was a finalist for the 2019 Tax Institute "Tax Star of the Year Award," and in 2024, he was a finalist for Lawyers Weekly's Taxation Partner of the Year.

Caitlin Ashworth, CTA (Life), is a Partner with CCK Lawyers. She has particular expertise in restructuring strategies for large corporate groups, taxation of trusts and strategies for managing tax on transactions, including exit events and asset sales. Caitlin advises on property transactions and joint venture structures, applying a holistic approach to the commercial and tax dimensions of each matter. She also provides tax and commercial advice and assistance to high net wealth individuals and family businesses.

Michael Butler, CTA, is the Partner in charge of the Finlaysons Tax & Revenue Group. Michael advises domestic and foreign clients on federal, international and state tax matters, and has a special interest in corporate restructurings, cross-border investment, property, wine and mining taxation, trusts, and estate and succession planning. Michael is a past chair of The Tax Institute's South Australia State Council and a regular contributor to Institute events. Michael was made an Honorary Life Member of The Tax Institute in 2024.

Adrian "the Taxinator" Cartland has practiced for nearly 20 years, working at a number of tax law roles in top tier firms as well as boutique tax practices, meeting his billable targets on at least a few occasions. About ten years ago he began thinking about the future of law and developed an interest in legal Artificial Intelligence, mostly in an effort to find a robot to do the work he was too lazy to do. Deciding that it was best to pursue this expensive and time consuming hobby (er, business) while not on someone else's timesheet he founded his own firm Cartland Law, and is now unemployable. Because Adrian knows very little about other, more normal, areas of law, Cartland Law specialises in and only accepts instruction in tax, trusts and technology. Coming from a family of engineers who have constructed many things beneficial to society, Adrian has instead created a number of tax and trust structures that are so complex no-one really knows what they do. He has also created Ailira, the Artificially Intelligent Legal Information Research Assistant and partly contributed to the doom of humanity by AI. He is the Chair of the Society of Trust and Estate Practitioners SA, the TTI's State Taxes Committee, was Australia's funniest lawyer in 2007 and holds the Australian record for fastest MMA knockout at 6 seconds.

Victoria Haffey LLB BBSc (Psych) GDLP is Deputy Tax Ombudsman Complaints. She has over a decade of experience in the Australian Public Service, with a strong background in tax administration, operational policy and process, including within complaints management, risk strategy, and stakeholder engagement. In her current role, she leads the Tax Ombudsman's complaints service, overseeing the independent investigation of taxpayer concerns. Victoria and her team work closely with individuals, tax practitioners, and government agencies to resolve tax administration disputes. They also gather data, identify the root causes of complaints, and share insights to inform opportunities for service and system enhancements. Previously, Victoria held senior leadership roles in the Australian Taxation Office, where she led frontline operations, provided law and policy advice, and oversaw national programs, including the delivery of major economic stimulus measures. She holds a Bachelor of Laws, a Bachelor of Behavioural Science (Psychology), and a Graduate Diploma in Legal Practice from QUT, and is admitted to practice as a lawyer in Australia.

Amy Lancaster is a Lawyer in Cowell Clarke's Tax and Revenue group. Amy advises private group clients on a wide range of Federal and State taxation law issues, as well as trust law issues. Amy assists clients in various matters including in preparing complex advices, obtaining ATO Private Binding Rulings and implementing private group restructures.

Daniel Lopresti is a partner at Clifton Hall and a Registered Liquidator with over 20 years' experience in all forms of corporate insolvency and restructuring. Daniel has been responsible for a number of voluntary administrations and receiverships of SMEs and mid-market entities, many of which resulted in the business continuing in operation, either through a restructure or sale as a going concern. In addition to his corporate insolvency experience, Daniel has also been involved in the preparation of investigative accounting reviews and advisory services for various stakeholders. Daniel is also experienced in winding up solvent entities and assisting in the restructure of corporate

Presenters

groups to simplify structures in a tax effective manner. In addition to his corporate insolvency experience, Daniel has also been involved in the preparation of investigative accounting reviews and advisory services for various stakeholders. Daniel is also experienced in winding up solvent entities and assisting in the restructure of corporate groups to simplify structures in a tax effective manner.

Joshua Pascale is an Associate Director in Cowell Clarke's Tax and Revenue and Superannuation Groups. Josh advises property and business owners on a wide range of federal and state tax law issues, as well as pertinent superannuation and commercial law matters. Josh has developed a particular interest in group restructures and the associated succession planning (private and business). Josh is a co-author of the Tax Institute's SMSF Income Stream Guide.

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 super is well known. She has been working in the super 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.

Linda Tapiolas, CTA, is a Partner in the Cooper Grace Ward Lawyers Commercial team. She provides a range of support services to accountants, financial planners, and other professional advisers. This includes technical advice on complex tax, CGT and Div 7A issues, as well as acting on business sales and acquisitions to ensure clients achieve commercial and tax-effective outcomes. Prior to joining Cooper Grace Ward, Linda worked as an accountant for 18 years advising clients on capital gains, business acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions.

Ben Turner, FTI, is an Expatriate and Employment taxes Specialist. He recently founded Atlas Tax and Employment Tax Advisory after almost 2 decades working in Big 4. Ben is a Chartered Accountant and Fellow of the Tax Institute specialising in taxation issues including expatriate taxation, Fringe Benefits Tax, superannuation/social security and payroll. Through Employment Tax Advisory, Ben continues to work closely with major organisations, particularly in the Human Resources and Finance areas to address remuneration and tax issues affecting the workforce. This includes designing effective processes, systems particularly with globally mobile workforces. Additionally, as Managing Director of Atlas Tax, Ben guides expats or inpats through their Australian tax obligations providing advice and compliance services, particularly in the area of tax residency, non-resident tax returns and capital gains considerations when selling property.

Dr Sylvia Villios, CTA, is an Associate Professor at the Adelaide Law School, University of Adelaide. She researches and teaches in taxation law, particularly focusing on questions about the operation of the Australian tax system, taxation policy, corporate taxation and the role, powers and accountability of the Commissioner of Taxation. Outside of her primary research area, she has published extensively on the role and operation of Australia's succession laws.

Dr Villios is the Associate Dean of Graduate Studies for the Faculty of Arts, Business, Law and Economics. She is a co-director of the Regulation of Commercial, Corporations, Insolvency and Taxation (ROCCIT) research unit which is based at the University of Adelaide. She is an editorial panel member of the Australian Tax Law Bulletin, Lexis Nexis. During her academic career she has published over 40 peer-reviewed journal articles. She has a strong industry presence and her background in taxation and commercial law extends beyond academia and includes experience in legal practice.

Venue and accommodation

Stamford Plaza Adelaide

150 North Terrace Adelaide, 5000 Adelaide

Stamford Plaza Adelaide is a premium 5-star hotel superbly located in the heart of Adelaide's CBD on the city's key cultural boulevard, North Terrace. Just 10 minutes from Adelaide Airport and a short 20-minute drive to the iconic beachside suburb of Glenelg, the hotel is perfectly positioned for both convenience and experience.

Getting there

Stamford Plaza Adelaide is approximately 7 km (around 19 minutes' drive) from Adelaide Airport. Attendees have access to a variety of travel options, including taxi, rideshare, private vehicle, or public transport.

To find the best route from your location please click here.

Parking

Stamford Plaza Adelaide offers a range of secure parking options available 24 hours a day, 7 days a week for hotel guests and visitors. On-site valet and self-parking options are available, subject to availability and height restrictions. Check this for more information.

Accommodation

Favourable room rates with a 12% discount off the best available daily rate have been negotiated and secured at Stamford Plaza Adelaide.

Accommodation bookings can be made by contacting the hotels directly and quoting the code "PR10H" when booking.

To book accommodation at Stamford Plaza Adelaide:
Phone: 08 8461 1111
Email: reservations@spa.stamford.com.au

Please note that as per hotel booking conditions, all accommodation booked is non-refundable. All additional hotel incidentals, including breakfast, remain the responsibility of delegates, and individuals will be responsible for payment of the balance of their account when checking out of the hotel. Please note that extra charges may be incurred for additional guests and will be charged to individual room accounts upon checkout. Rates subject to change based on availability at time of booking.

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 event 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 event.

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 reception

The forum's Networking reception will be held directly following the last session on Thursday from 5.30pm at Stamford Plaza Adelaide. The Networking reception is included in the full 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/ lunches	Attendance at the Networking reception*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Employer registration This registration option allows one registration to be shared between multiple attendees from the same firm.	✓		

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

Discounts

Early bird registration

All registrations received and paid on or before Friday, 6 February will be entitled to an early bird discount.

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

Group discounts

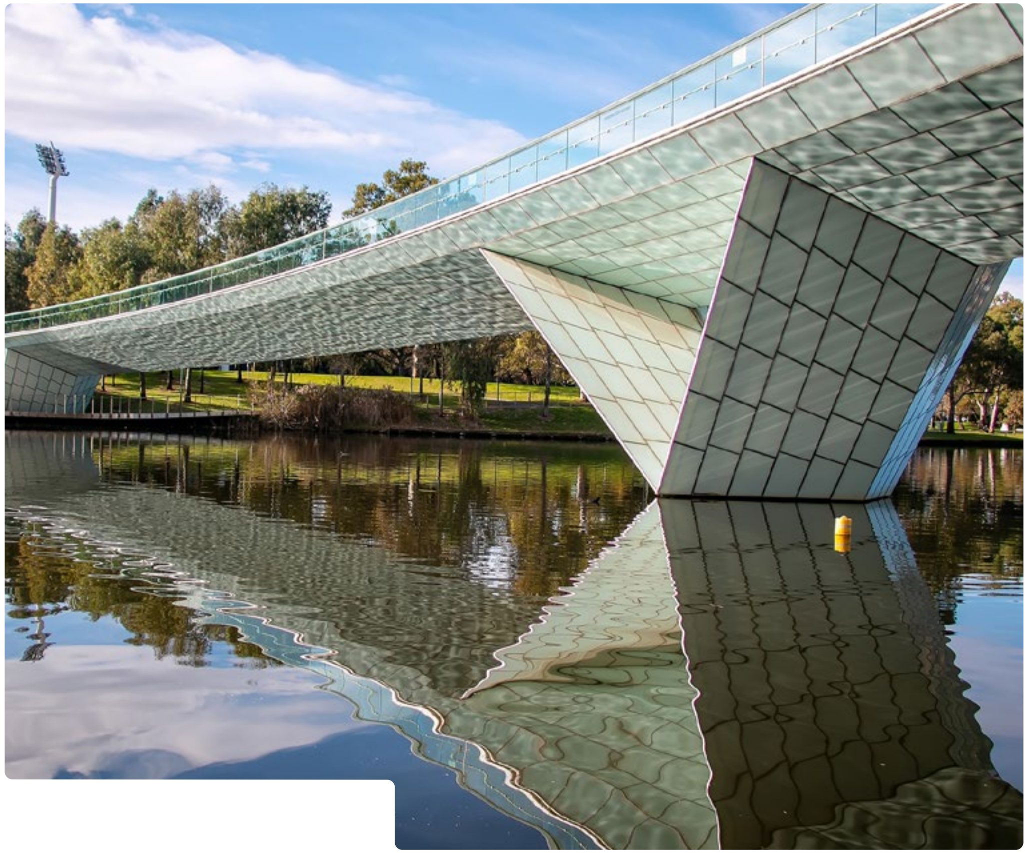
Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

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

SA Tax Forum
Registration form

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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 15 for registration inclusions.

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 6 February 2026	☐ $1,695	☐ $2,090	☐ $1,995
Standard registration Register after Friday, 6 February 2026	☐ $1,895	☐ $2,290	☐ $2,195

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

Networking reception

The Networking reception is INCLUDED in the registration fee for delegates attending the full forum.

Thursday, 5 March 2026 at the Stamford Plaza Adelaide

☐ 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 reception 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 $230 on Affiliate membership on the first 12 months
- access member-only prices to this and future events
- access all member-only technical resources.

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

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

26-003EVT_11/25

3 Payment summary

Registration fees $

Additional guest tickets – Networking reception ($80 each) $

Total payable $

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

4 Payment method

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

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

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

Name on card:

Card no.: Expiry date: MM/YY

Cardholder's signature:

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

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

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 TTIs 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

26-003EVT_11/25

SA Tax Forum Employer Ticket
Registration Form

The Tax Institute

44832 | WD

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 Employer Ticket types

Employer tickets offer a flexible option for employers to send multiple attendees to an event. We have different options to suit you and your team.

	Classic	Plus	Premium	Tailored
Early bird on or before Friday, 6 February	$3,450	$4,950	$6,450	
Standard after Friday, 6 February	$3,650	$5,150	$6,650	
Best for	SME	Mid-Tier	Corporate	Large/National
Flexibility	Your choice of 30 sessions	Your choice of 45 sessions	Your choice of 60 sessions	Contact us to tailor a quote today for you and your team to attend multiple events.
Team attendance	Up to 10 attendees	Up to 15 attendees	Up to 20 attendees	
Session formats	Face-to-face	Face-to-face	Face-to-face	
Networking	5 networking passes	10 networking passes	15 networking passes	

All Employer Ticket attendees receive:
- Electronic access to download available technical papers and presentations
- Morning tea, lunch and afternoon tea
- CPD hours allocated according to attendee

1 session = 1 CPD hour per attendee

Session selection
- Coordinators will be contacted with a session selection form to complete on behalf of attendees, based on the Employer Ticket type selected.
- The session selection form must be completed in full to ensure proper allocation of CPD hours post-event.

1 Employer Ticket types

Promotional code: ______

Ticket type	Cost	No. of tickets	Sub-total
☐ Classic			
☐ Plus			
☐ Premium			
		Total payable $	

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 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.

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

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The Tax Institute

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