

Yarra Valley Tax Retreat



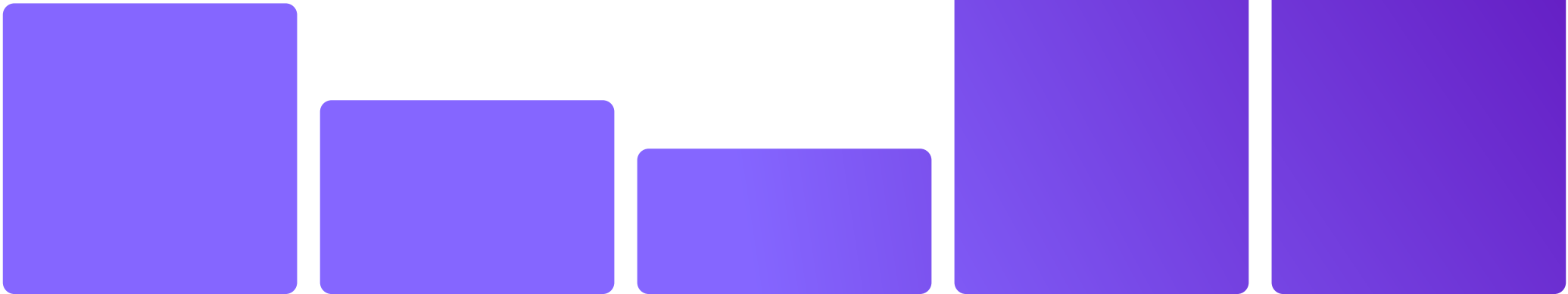
 23-24 Jul 2026

 CPD 10

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

- Rachel O'Donnell, CTA, O'Donnell Tax Law, Chair, Retreat Organising Committee
- Daniel Angelovich, FTI, Forvis Mazars
- Megan Bishop, Piper Alderman
- Neil Brydges, CTA, Sladen Legal
- Karen Goodfellow CTA, Goodfellow Tax Advisory
- Amanda Guruge, CTA, Tax Controversy Partners
- Paul Hockridge, CTA, Hockridge Advisory
- Adrian Zuccarini, FTI, Australian Taxation Office

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Welcome

Yarra Valley Tax Retreat 2026 – Terrific tax technical and noteworthy networking!

Each year, tax advisors descend upon the gorgeous Yarra Valley for a premium retreat that offers up a delightful mix of deep yet practical technical sessions and wonderful networking opportunities. Our program for 2026 is our best yet!

The Yarra Valley Tax Retreat is worth locking into your diary to make the most of all that the retreat has to offer. Either stay and play after the retreat, or head back to the office to implement the learnings and strategies you pick up during the retreat.

Our committee has pulled together technical experts that will delve into (then pull us out of) the deep, dark abyss of various current tax issues ... and leave us feeling enlightened and equipped to address these issues in our practices. Our presenters will use case studies to highlight and solve complex tax problems, setting us up for success when we work through these issues with our clients.

Some sessions address ongoing complexities but shed new light on them or highlight current areas of focus of the ATO (and, where relevant, the State Revenue Offices). Other sessions consider issues that are sure to come across your desk soon if you've not previously dealt with them, preparing you so that you can expect the unexpected.

We have a great mix of sessions that will particularly appeal to practitioners that work with small to medium enterprises and groups, and high net worth individuals and families, including thorny Div 7A case studies, practical trust law issues that continue to rear their ugly heads, strategic considerations relating to residences, and SMSF do's, don'ts, and definitely nots!

This year, we return to the familiar warmth of the RACV Country Club and Resort, which provides the perfect backdrop in the Yarra Valley region. After strong tax technical sessions with practical case studies, we will switch modes to unwind as we network and enjoy the delectable retreat dinner in the ambiance of the beautiful Yarra Valley – though some may choose to continue to discuss and debate tax issues over a glass (or more) of some of the region's most delicious wine!

Our 2026 Yarra Valley Tax Retreat Organising Committee looks forward to seeing you in July!



Rachel O'Donnell, CTA
Chair, Retreat Organising Committee

Early bird pricing offer
Register on or before 26 June 2026 to save!

Technical program

Day 1 Thursday, 23 July 2026

Time *AEST	Session
9:00 – 9:45am	Registration and Morning tea
9:45 – 10:00am	Welcome and President's Address Speakers: Rachel O'Donnell, CTA, Chair, Retreat Organising Committee, Tim Sandow, CTA, President, The Tax Institute
10:00 – 11:00am	Session 1: Property Pain Points – GST and State Taxes in a State of Flux! Speakers: Geoff Mann, CTA, Deloitte, Aathees Paransothy, Deloitte This session will consider key GST and State tax issues that arise in common structures, as well as the risks of unintentionally triggering transfer duty or landholder duty (with reference to recent cases). The session will also address some of the most common GST issues that arise in the context of property developments and subdivisions, highlighting practical traps and recent developments.
11:00am – 12:00pm	Session 2: Property Development Agreements – Tax Risks and Cases Speakers: Simon Tisher, CTA, Victorian Bar, Adrian Zuccarini, FTI, Australian Taxation Office This session will unpack the ATO's focus on Property Development Agreements (PDAs), drawing on recent Taxpayer Alerts and the broader compliance posture. We'll examine the implications of recent decisions, including in <i>Morton v FCT</i> , highlighting how courts are shaping the tax characterisation of development arrangements. The discussion will extend to indirect tax considerations, such as duty issues (especially economic entitlement duty) and the GST treatment, with insights from relevant PCGs and other guidance. This session will be focused on seeking solutions and will be supported by a practical case study.
12:00 – 1:00pm	Lunch
1:00 – 2:00pm	Session 3: CGT vs PPR – Understanding Main Residence Exemptions Across Tax and State Regimes Speaker: Russell Krupp, CTA, Moray & Agnew Lawyers It is said that home is where the heart is. It can also be said that home is where some of the most complex provisions of the tax act lie! The main residence exemption is far-reaching in its effect and so tax practitioners interact with it often. Whilst the 'basic case' CGT main residence exemption is reasonably straight forward it doesn't take long before things get complicated. This session will consider some of those more complex issues such as: • Issues with applying the exemption to dwellings forming part of a deceased estate • Applying the exemption where a dwelling is inherited by a non-resident • Tips for structuring the ownership of a main residence and/or changing a pre-existing structure: and • The interaction between the CGT main residence exemption and state based Principal Place of Residence land tax exemptions (which vary between jurisdictions) and more ... Designed for experienced practitioners, this session focuses on practical risk areas, and strategic considerations when advising on involved main residence matters.

Technical program

Day 1 Thursday, 23 July 2026 continued

Time *AEST	Session
2:00 – 3:00pm	Session 4: Why a Three-Letter Word Ending in “X” May be the Most Important Issue in Relationship Breakdowns Speaker: Evan Beissel, FTI, Forzis Mazars For many years, TAX has been treated almost like a taboo subject in the context of relationship breakdowns – something to be dealt with later, or assumed to be automatically resolved through family law processes. In reality, tax considerations are now one of the most critical, complex, and potentially costly elements of separation. Relationship breakdowns are often profoundly taxing in every sense: emotionally, financially, and administratively. Lengthy disputes, heightened stress, and the pressure to “just get things done” can cloud judgement and lead to decisions that carry significant unintended tax consequences. While concessional tax provisions exist to soften the impact of separation – such as CGT rollover relief – these concessions are not universal, not automatic, and often not as protective as clients assume. In many cases, the concessions may not apply at all, leaving one or both parties exposed to substantial tax liabilities. This session explores the growing importance of tax awareness in family law matters, particularly as separating couples increasingly seek to sell or restructure assets early to lock in tax outcomes or access liquidity. We’ll examine how key tax rules intersect with family law settlements, including: • Main residence rules and the complications that arise when one party moves out, rents the property, or delays sale • Foreign residency issues, which can dramatically alter CGT outcomes and remove access to the main residence exemption entirely • The role of Binding Financial Agreements (BFAs) in managing tax exposure and ensuring tax-effective asset division; and • Common tax considerations for transfers of assets held by trusts and companies as part of a family law settlement We’ll also unpack the interplay between tax, duty, and land tax when assets are transferred under family law arrangements – an area filled with traps for advisers, especially when parties attempt to minimise legal costs or rely on informal agreements. A recurring theme is that the desire to reduce costs, avoid conflict, or finalise matters quickly can lead to decisions that ultimately become the most expensive choices of all. When tax is overlooked, assumed, or treated as an afterthought, the consequences can be long-lasting and financially severe. This session will equip advisers with the insight needed to identify risks early, guide clients through emotionally charged decisions, and ensure that tax is not the silent factor that turns an already difficult situation into a financially devastating one.
3:00 – 3:30pm	Afternoon tea
3:30 – 4:30pm	Session 5: Estates: Tips, Traps, and Hot Issues Speakers: Chanmony Om, BNR Partners, Milana Starikov, BNR Partners This session will explore key issues in deceased estates and estate taxation, focusing on practical considerations for everyday practitioners. We will examine residency rules for both estates and beneficiaries, including how residency status impacts tax outcomes and administration. With the global mobility of individuals, this is not a ‘set and forget’ matter. The discussion will also highlight common estate planning strategies such as life interests, rights to occupy, superannuation, and testamentary trusts and the associated tax considerations. To tie these concepts together, the session will contain a practical case study illustrating common tax issues that arise in estate administration.

Technical program

Day 1 Thursday, 23 July 2026 continued

Time *AEST	Session
4:30 – 5:30pm	Session 6: Division 7A in Practice – Challenges and Opportunities Panellists: Kaitilin Lowdon, ATI, Sladen Legal, Adrian Zuccarini, FTI, Australian Taxation Office Facilitator: Leanne Connor, CTA, WGC Business Advisors This panel will explore the practical challenges of Division 7A, focusing on shareholder loans, UPEs, and the real-world issues that arise in restructures and trust distributions. Panellists will discuss some mini-case studies to focus on thorny Div 7A issues, the ATO's current approach, common compliance traps, and practical strategies for managing risk while maintaining commercial flexibility. Practical issues include UPE's and minors, setting off loans, forgiveness and statute barred debts, s109C and the lease of company property and whether Div 7A loans are preferable to franked dividends, corporate and natural person beneficiaries and estate planning.
5:30 – 7:00pm	Delegate free time
7:00 – 10:00pm	Retreat dinner



Retreat drinks & dinner

Enjoy an evening of drinks and dinner alongside your colleagues, peers and Retreat speakers.

Date: Thursday, 23 July 2026

Time: 7:00–10:00pm

Venue: RACV Healesville Country Club & Resort

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

Dress: Business or business casual

Technical program

Day 2 Friday, 24 July 2026

Time *AEST	Session
9:00–10:00am	Session 7: Trust Matters – Navigating FTEs, Restructures and Distributions Speaker: Andrew de Wijn SC, Victorian Bar, Jennifer Vogan, Victorian Bar This session will cover key trust issues, including the ATO's technical reasons for denying franking credit eligibility and the implications for FTEs, restructures, and distributions. We'll also examine testamentary trusts, particularly bloodline and child maintenance trust provisions, and finish with practical guidance on identifying and rectifying invalid distributions.
10:00–11:00am	Session 8: Discretionary Trust Distributions: Practical Guidance for the Year Ahead Speaker: Michael Flynn KC, CTA-Life, Owen Dixon Chambers West In this session, we explore the practical complexities of family trust elections, interposed entity elections, and the application of family trust distribution tax, with a focus on how these rules are being tested in current ATO reviews. We'll examine common risk areas, recent ATO audit themes, and the strategies advisers are using to safeguard clients – ranging from tightening distribution documentation to reviewing historical patterns and ensuring elections are correctly made and maintained. This session equips delegates with a clear understanding of compliance expectations and practical steps to reduce exposure during ATO scrutiny.
11:00–11:30am	Morning tea



Technical program

Day 2 Friday, 24 July 2026 continued

Time *AEST	Session
11:30am–12:30pm	Session 9: Modernising Trusts – Amendment Powers, Lost Deeds and Emerging Tax Issues Speaker: Dr Philip Bender, ATI, Victorian Bar This session will cover the recurring issues around amending trust deeds, winding up trusts and dealing with lost deeds, highlighting why these “old” problems continue to resurface. We’ll consider recent case law shaping the parameters of amendment powers from trust law, capital gains tax and transfer duty perspectives, and examine how deed changes interact with other tax provisions. Practical examples will illustrate common risks and how to keep variations and restructures valid and effective. Finally, we’ll touch on some of the practical challenges that arise when trust deeds are lost or incomplete, when the beneficiary class is either too narrow or too wide and some of the flow on effects.
12:30–1:30pm	Session 10: SMSF Investment – The Do’s, Don’ts, and Definitely Nots! Speaker: Daniel Butler, CTA, DBA Lawyers This session provides a focused overview of the key investment and related tax rules outlining what SMSF trustees may and may not invest in under the SIS Act, SIS Regulations and under the ITAA 1936 and 1997. Participants will be guided through the core compliance rules that underpin all investment decision-making, including the sole purpose test, arm’s-length requirements, the investment strategy obligations, and restrictions on acquiring assets from related parties. We will also examine key ATO guidance that shape practical compliance expectations. We also address common risk zones including SMSF investments involving real property, dealings with related entities, and the proper structuring and maintenance of LRBAs. Using examples, we run through practical tips, traps and strategies to minimise risk. By the end of the session, attendees will have a clear framework for identifying permissible investments and identifying red flags before they escalate into regulatory breaches.
1:30–2:30pm	Retreat closing address followed by light lunch



Presenters

Evan Beissel, FTI, is a Partner at Forvis Mazars and leads the Melbourne tax consulting division. He focuses on providing practical, commercially grounded advice by helping clients navigate complex tax issues and achieve workable outcomes. Evan works with a broad range of clients, with particular experience advising high-wealth family groups and privately owned businesses. He specialises in supporting clients through significant “key events”, including matrimonial property settlements, international relocations, deceased estates, and business sale and succession transitions. Evan is a Chartered Accountant and holds a Masters of Taxation from the University of Melbourne.

Dr Philip Bender, ATI, is a barrister at the Victorian Bar. He is the author of Bender’s Australian Stamp Duties, published by the Tax Institute. He acts in Federal and State taxation, superannuation, and trusts and estates matters for taxpayers and revenue authorities. In the trusts area, he has acted in many taxation disputes involving trusts issues, and has acted in many trusts matters involving, amongst other topics, trust deed and will interpretation, alleged breaches of trust; trustee removal applications; judicial advice; charitable trusts; and superannuation death benefits disputes.

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 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.

Leanne Connor, CTA, is a Director of WGC Business Advisors, a chartered accountancy firm specialising in taxation and strategic advice to SMEs and high net worth individuals. Leanne has over 30 years experience providing accounting, business advisory, strategic superannuation and taxation services. Leanne’s areas of expertise include tax and superannuation planning, business restructuring and understanding the fundamental issues relating to SMSFs, family trusts and private companies. Leanne is a Director and National Council member of The Tax Institute and past chair of its Victorian State Council & PD Committee. She is a regular presenter for

The Tax Institute and winner of the 2020 SME Tax Adviser of the Year Award.

Andrew de Wijn SC has been a barrister for 14 years, practising exclusively in tax matters. As well as appearing in courts and tribunals, Andrew provides technical tax advice to clients and assists in dealing with the ATO, particularly in relation to ruling requests and objections as well as settlement negotiations. Before coming to the Bar, Andrew worked for 8 years as a solicitor with Greenwoods & Freehills.

Michael Flynn KC, CTA (Life), is a Barrister at Owen Dixon Chambers West, specialising in taxation, and was National President of The Tax Institute in 2014. Michael has appeared in many leading taxation cases in the Federal Court and the High Court and has been a member of various committees of The Tax Institute over the past 25 years.

Kaitilin Lowdon, ATI, is a Principal Lawyer in Sladen Legal. She acts for a diverse range of clients, including (ultra) high net wealth individuals, family offices and business enterprises. Her expertise includes advising clients on high-profile and complex tax matters, including reviews, audits and litigation, and transactions, across a wide range of taxation matters.

Geoff Mann, CTA, advises on indirect tax with particular emphasis on goods and

services tax and state/territory taxes, including stamp duty and land tax. Geoff’s tax experience spans over thirty-five years, and he has advised a wide range of clients, across a range of industries and transaction types and issues, across all Australian jurisdictions. Geoff deals regularly with and maintains a good relationship with all Australian revenue authorities. Geoff has represented clients in a range of tax litigation and dispute matters. Geoff’s multi-skilling across tax areas and his dual legal and accounting qualifications, place him in a unique position to assist clients with complex tax issues relating to transaction structuring and implementation, including M&A, infrastructure projects, real estate transactions, corporate restructures, prudential reviews, , and liaison with and managing disputes with revenue authorities.

Chanmony Om is passionate about assisting her clients with the tax issues of a deceased estate and ensuring the estate is administered in the most tax effective manner. Chanmony has extensive experience in the main residence exemption provisions including the partial main residence exemptions, calculation of capital gains on investment properties and preparation of private ruling requests for deceased estates. Chanmony also has experience in advising

Presenters

small businesses in the areas of small business capital gains tax concessions, fringe benefits tax and year-end tax planning and business structuring. Chanmony has degrees in Commerce and Law, is a Chartered Accountant and a member of both The Tax Institute and CAANZ. In her spare time, Chanmony enjoys flower arranging and photography.

Aathees Paransothy advises on stamp duty, land tax, goods and services tax and other indirect taxes. He has experience working on transactions and compliance matters for clients across diverse industries, including property and construction, financial services, infrastructure, resources, and retail. He advises across all Australian States and Territories, delivering tailored solutions that account for the nuances of each jurisdiction's legislation and administrative practices.

Milana Starikov has had a wide range of experience in the tax consulting space over a number of years. She is focused on providing timely and practical advice for a tax effective real world outcome. She prides herself on compassion and in looking beyond the tax issues to the underlying families and relationships, ensuring that these are also managed sensitively, particularly when dealing with deceased estates. Milana has particular

expertise in Victorian State taxes, Division 7A, structuring and philanthropy and enjoys applying her knowledge to achieve tangible results for her clients. Milana has degrees in Commerce and Law, is a Chartered Accountant, Fellow of the Tax Institute and a full member of STEP. Outside of the office, Milana will be curled up with a book, experimenting with baking or chasing after small children.

Simon Tisher, CTA, has been a barrister at the Victorian Bar since May 2003. He is well known and respected as a barrister and within the tax profession. Most of Simon's experience at the Bar relates to tax matters (state and federal) and matters related to taxation: superannuation, insolvency, bankruptcy and professional indemnity claims (commonly involving tax advice). He acts for taxpayers and for the Australian Taxation Office in disputes ranging from small individual matters to large corporate tax disputes. Simon has sound experience in commercial litigation matters and has a busy advisory practice. Simon also has an interest in National Disability Insurance Scheme matters. Simon has been included in "Leading Tax Barristers – Victoria" in Doyle's Guide every year from 2017 and in Best Lawyers (Tax Law, 2021, 2022 and 2023 editions). He is a past Sir Charles Lowe prize winner for advocacy. Simon

has published several articles in the Law Institute Journal and Taxation in Australia, and is the author of the tax chapter of de Groot's Wills, Probate and Administration Practice (Victoria). He is a member and past chair of The Tax Institute's State Taxes Committee. He is a frequent presenter to organisations such as Television Education Network, the Tax Institute and Legalwise Seminars.

Adrian Zuccarini, FTI, is Law Interpretation Director within Tax Counsel Network with 15 years' experience at the ATO. He provides technical advice and guidance on complex technical issues arising within the Private Groups, High Wealth Individuals and Public Group and International areas. Prior to working in Tax Counsel Network Adrian has worked in the Private Wealth business line, with a focus on issues affecting professional firms. Adrian holds a Bachelor of Business with Honours in Taxation and a Master of Laws (Juris Doctor) from Monash University and is admitted to legal practice.



Venue and accommodation



RACV Healesville Country Club & Resort

122 Healesville Kinglake Rd, Healesville VIC 3777

The RACV Healesville Country Club & Resort provides a range of leisure, dining, accommodation and event options in the heart of Victoria's premier wine and fresh produce region, the Yarra Valley. Explore all the region has to offer, including wineries, galleries, wildlife, walking trails, adventure activities and local produce suppliers.

Getting there

The resort is approximately a 90-minute drive from Melbourne Airport (Tullamarine) or Melbourne CBD. Car hire is readily available at Melbourne Airport and we encourage you to book when registering for the event.

Parking

RACV Healesville Country Club & Resort has free parking available for retreat guests.

Accommodation

RACV Healesville Country Club & Resort offers luxurious accommodation with stunning views of the resort. Accommodation is limited, book early to avoid disappointment.

A corporate rate has been negotiated with RACV Healesville Country Club & Resort. Please call 03 5962 4899 and quote "The Tax Institute" to secure your booking. Alternatively click [here](#) to book online.

Please note that as per hotel booking conditions, full payment via credit card is to be provided and processed at the time of booking. Any cancellations of room nights within 14 days of arrival, will incur a cancellation fee of the full rate. 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.

Planning to stay for the weekend? As accommodation is limited, we recommend you book your accommodation as soon as possible to avoid disappointment. For more accommodation options, please click [here](#).



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 retreat counts for 10 hours of CPD with The Tax Institute.

The Tax Institute virtual attendee hub

This event will be accessible to all delegates via our dedicated Virtual Attendee Hub. Program information, materials (including technical papers and presentations), survey forms, and more will be available on the platform. All delegates are encouraged to access it prior to the event.

Technical papers and PowerPoint presentations will be made available approximately five days before the event. Delegates will receive instructions on how to access the Virtual Attendee Hub via email.

Delegate list

A delegate list will be included on the attendee hub to assist with networking. Please indicate at the time of registration if you do not want your name to be included. Alternatively, you can edit your profile visibility settings in the virtual attendee hub at any time during the event.

Dress code

Business or business casual attire is suitable for the duration of the retreat.

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

Retreat dinner

Following a day of technical sessions, delegates are invited to unwind with the casual style retreat dinner featuring the finest fresh produce and wines from the Yarra Valley region. Additional tickets are available to purchase for accompanying persons at a cost of \$150.

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/ retreat lunches	Retreat dinner*
Full registration This registration option entitles one delegate to attend the entire event.	✓✓	✓✓	✓✓
Day registration This registration option entitles one delegate to attend a full day of technical sessions.	✓✓	✓✓	✓✓

*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, 26 June 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 13 for registration inclusions.

Full registration – 10 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before 26 June 2026	☐ \$1,495	☐ \$1,915	☐ \$1,795
Standard registration Register after 26 June 2026	☐ \$1,695	☐ \$2,115	☐ \$1,995

Single day registration – 4–6 CPD hours

Please select day: Thursday ☐ Friday ☐

	Member	New member*	Non-member
Standard registration – Day 1	☐ \$995	☐ \$1,415	☐ \$1,195
Standard registration – Day 2	☐ \$645	☐ \$1,065	☐ \$795

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

Retreat drinks & dinner

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

Thursday, 23 July 2026 at the RACV Healesville Country Club & Resort

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

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

Dietary requirements:

2 Delegate contact details

Member no.:

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

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

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

*Become a member and save!

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

- save over \$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

\$

Additional guest tickets – Retreat drinks & dinner (\$150 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:

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's 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

-  linkedin.com/school/the-tax-institute
-  facebook.com/thetaxinstitute
-  twitter.com/taxinstituteoz
-  instagram.com/thetaxinstitute_

taxinstitute.com.au

