The Tax Institute



SA Tax Forum

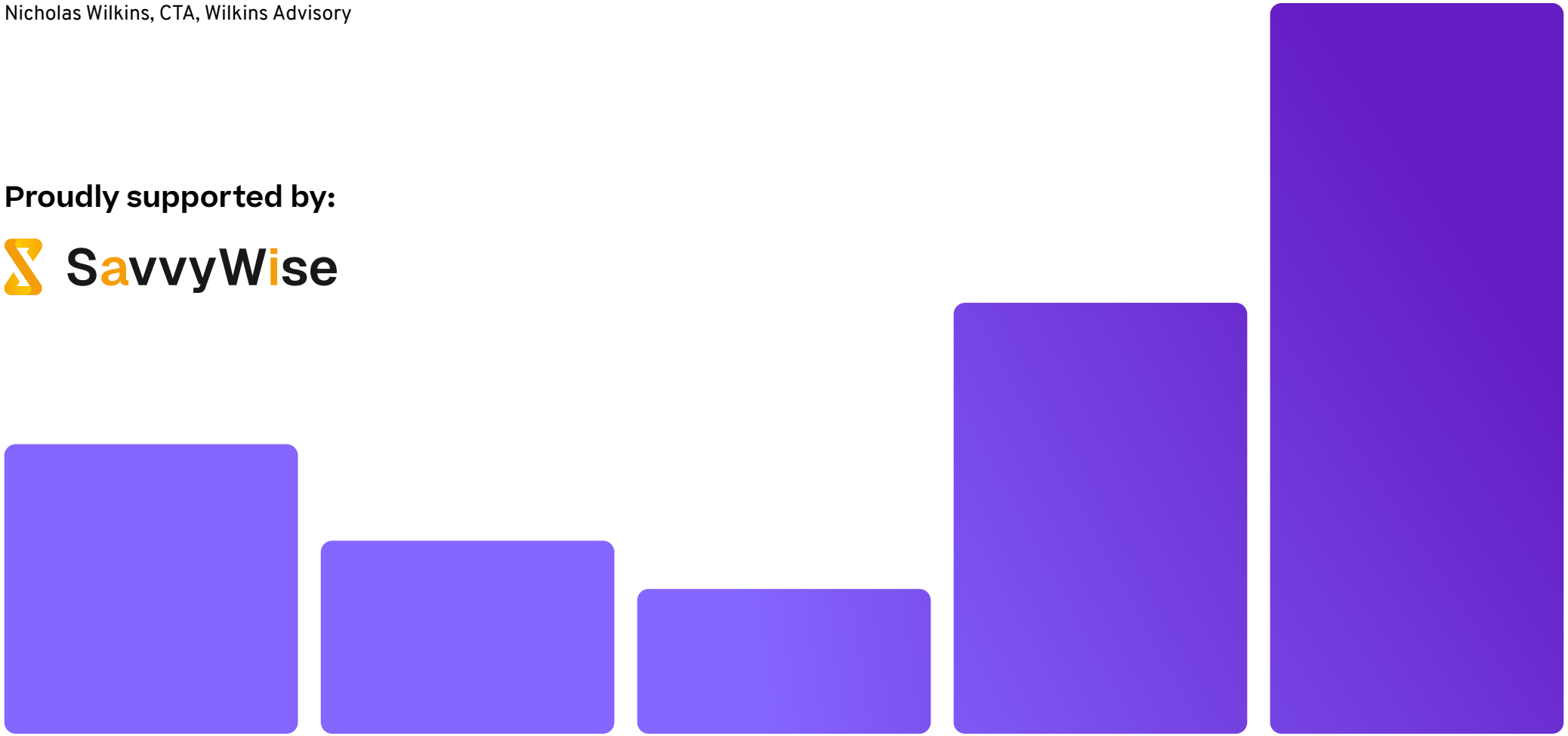
4-5 Mar 2027 | CPD 13

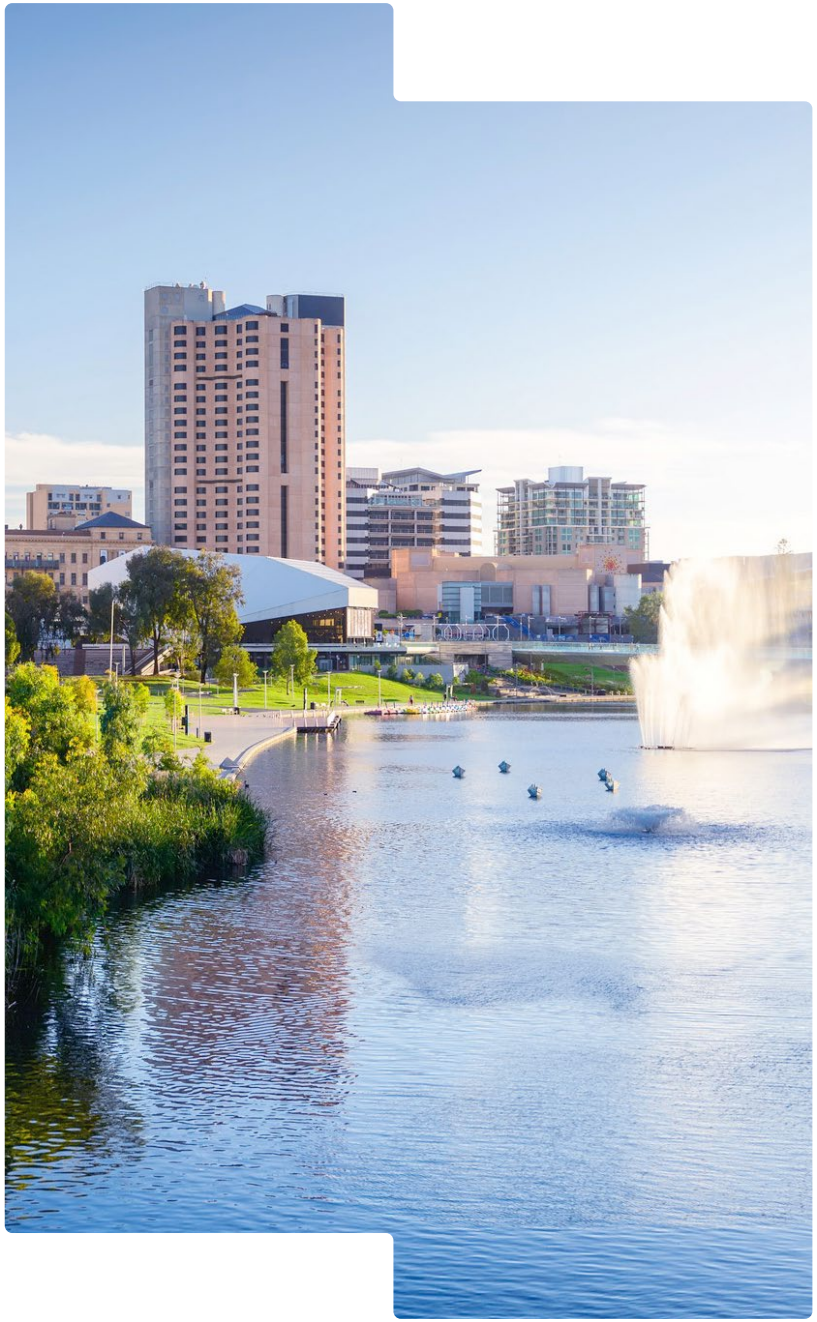
The Tax Institute gratefully acknowledges the generous assistance of members of the Organising Committee:

Caitlin Ashworth, CTA, CCK Lawyers, Co-Chair, Forum Organising Committee
Joshua Pascale, Cowell Clarke, Co-Chair, Forum Organising Committee
Connor Eglinton, HWL Ebsworth Lawyers
Jiang Lin, RSM Australia
Belinda Piffl, ATI, LBK 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 welcome you to the SA Tax Forum, taking place on 4 and 5 March 2027 in Adelaide.

The forum continues to be one of South Australia's leading events for tax professionals, bringing together practitioners from across the profession for two days of technical updates, practical insights and valuable networking opportunities.

This year's program explores many of the most significant developments shaping the tax landscape, including Division 7A following the Bendel decision, superannuation and LRBA reforms, international tax considerations, professional practice structures, stamp duty developments, AML/CTF obligations and the evolving pressures facing modern tax practitioners. Delegates will also benefit from two interactive workshop streams covering upcoming CGT reforms and the proposed minimum tax trust regime, providing practical guidance and planning opportunities ahead of significant legislative change.

In addition to the technical program, the forum provides an opportunity to connect with colleagues, share experiences and discuss emerging issues impacting the profession. We encourage you to take advantage of the networking opportunities throughout the event and join us at the networking function at the conclusion of day one.

The SA Tax Forum Program Committee would also like to thank our speakers, all of whom have generously volunteered their time and expertise to share their knowledge and practical insights with delegates.

We look forward to welcoming you to the SA Tax Forum and trust you will find the program both informative and valuable to your professional practice.



Caitlin Ashworth, CTA
Co-Chair, Forum Organising Committee



Joshua Pascale
Co-Chair, Forum Organising Committee

Early bird pricing offer
Register on or before Friday, 5 February 2027 to save!

Technical program

Day 1 Thursday, 4 March 2027

Time	Session
8:00 – 8:15am	**Registration**
8:15 – 8:30am	**Welcome and Opening Address**
8:30 – 9:45am	**Session 1: Division 7A After *Bendel* – Where Things Stand and What Practitioners Should Do** **Speaker: Michael Butler, CTA (Life), Finlaysons** The *Bendel* decision raises important questions about the application of Division 7A to unpaid present entitlements (UPEs) and the treatment of private company arrangements. With potential legislative changes on the horizon and the end of the financial year approaching, this session will explore the latest developments and the practical considerations for advisers managing Division 7A obligations. Key discussion points include: • A review of *Commissioner of Taxation v Bendel* [2026] HCA 18 and tips for the steps to take moving forward and looking back • How the ATO views the decision in its Decision Impact Statement • How the wording of a trustee distribution resolution could result in a different outcome to the Bendel decision • Dealing with the moving parts, including: – differing trust deed content that may produce a different outcome to the Bendel case – how section 100A can still catch you out – how Subdivision EA can still catch you out – how the 2026–27 federal Budget's minimum tax on discretionary trusts may put the whole issue to rest • How to account for a trust resolution to "set aside" net income on a separate trust: – in the financial statements of the trust – if the trustee accesses the funds held in a sub-trust • EOFY planning considerations and decisions that practitioners need to make regarding UPEs; and • Practical examples.
9:45 – 10:30am	**Session 2: LRBAs – Where Do the Rules Stand Now?** **Speaker: Shirley Schaefer, BDO** The introduction of changes to residential limited recourse borrowing arrangements (LRBAs) will change the way SMSFs invest in property. This session recaps the current LRBA rules and practical application of those rules. Shirley will cover the impact of the reforms, including the restrictions on new residential LRBAs, the operation of grandfathering provisions, and the opportunities and risks for existing arrangements. We will also examine alternative structures and refinancing considerations, together with the interaction of the LRBA changes with proposed negative gearing, CGT and the $3million superannuation tax measures. Attendees will gain practical insights into navigating the evolving landscape and advising clients in a post-reform environment.

Technical program

Day 1 Thursday, 4 March 2027 continued

Time	Session
10:30–11:00am	**Morning tea**
11:00am–12:00pm	**Session 3: Small Business CGT Concessions – Eligibility, Tests and Traps** **Speaker: Sonia Mascolo, CTA, Bentleys** The small business CGT concessions can provide significant tax benefits, but navigating the eligibility requirements and threshold tests can be complex. This session will break down the key concessions, explore recent legislative changes affecting the $10 million maximum net asset value threshold and examine how the eligibility tests apply in practice. Key discussion points include: • An overview of the small business CGT concessions, with a focus on the 50% active asset reduction • Eligibility requirements and how the $10 million maximum net asset value test applies • Applying the net asset value test, including which assets and liabilities are included • Identifying relevant connected entities and affiliates when assessing eligibility; and • Common pitfalls and practical considerations when applying the concessions.
12:00–1:00pm	**Workshop 1: Old Gains, New Rules – Understanding CGT from 1 July 2027** **Speakers: Caitlin Ashworth, CTA, CCK Lawyers, Daniel Kedzior, CCK Lawyers** The changes to capital gains tax commencing on 1 July 2027 will reshape how gains are calculated and taxed. Through worked examples, this session will explore the new rules, their transitional operation and the practical steps advisers should consider before commencement. Topics include: • The shift from the general 50% CGT discount to indexation and the new 30% minimum tax • Transitional treatment of existing assets, including accrued gains and pre-CGT assets • Comparing market valuations with the proposed apportionment method and understanding its limitations • Applying capital losses and CGT concessions under the new rules • Implications for trusts and residential property; and • Planning, valuations and records to consider before commencement.
1:00–2:00pm	**Lunch and Annual Meeting of the State**

Technical program

Day 1 Thursday, 4 March 2027 continued

Time	Session
2:00 – 3:00pm	**Workshop 1: Old Gains, New Rules – Understanding CGT from 1 July 2027** Speakers: Caitlin Ashworth, CTA, CCK Lawyers, Daniel Kedzior, CCK Lawyers *Workshop 1 continued ...*
3:00 – 3:30pm	**Afternoon tea**
3:30 – 4:30pm	**Session 4: AML and Counter-Terrorism Regime – Where Are We Eight Months In?** Speaker: Richard Storey, Grant Thornton Eight months into the expanded AML/CTF regime, this practical session will provide an update on what has happened since the regulations commenced, including key issues emerging in practice. The session will cover: • What has happened since the regulations commenced • Updates and guidance from AUSTRAC • Designated services and obligations relating to tax advice • Practical experience and compliance tips, including managing overlapping regulatory obligations; and • Reporting obligations for AML/CTF.



Technical program

Day 1 Thursday, 4 March 2027 continued

Time	Session
4:30 – 5:30pm	**Session 5: Under Pressure – The Realities of Modern Tax Practice** **Speakers: Caitlin Ashworth, CTA, CCK Lawyers, Darryl Cross, Institute for Leadership Coaching, Tim Sandow, CTA, BDO** From federal Budget changes and ever-increasing compliance demands to AI disruption and rising client expectations, the pressures on tax practitioners have never been greater. Bringing together perspectives from a solicitor, an accountant and a mental health professional, this panel will tackle the real challenges facing the profession and explore how practitioners can adapt to change, manage uncertainty and support clients while maintaining their own wellbeing. Key discussion points include: • Keeping up with federal Budget changes, new legislation and growing compliance obligations without becoming overwhelmed • Navigating AI and what it means for the future of tax practitioners • Managing client expectations, difficult conversations and providing advice in uncertain times; and • Setting boundaries, managing stress and building a more sustainable professional practice.



Networking reception

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

Date: Thursday, 4 March 2027
Time: From 5:30pm
Venue: The Playford Hotel Adelaide
Price: Inclusive for all full registration delegates
$80 for additional tickets – see registration form for details
Dress: Business or business casual

Technical program

Day 2 Friday, 5 March 2027

Time	Session
8:30 – 9:30am	**Session 6: Stamp Duty: What's New and What You Need to Know** **Speaker: Paul Ingram, CTA, Minter Ellison** This practical update will explore the latest developments in South Australian stamp duty, highlighting key issues, emerging considerations and practical implications for tax professionals, including: • Changes affecting qualifying land • Stamp duty implications of CGT and trust reforms; and • Key considerations in applying the charity exemption.
9:30 – 10:30am	**Session 7: Professional Practice and PSI** **Speakers: Connor Eglinton, ATI, HWL Ebsworth Lawyers, Neil Oakes, CTA, Perks** The personal services income (PSI) and personal services business (PSB) rules remain a key integrity measure for professional services structures. However, their application continues to create practical challenges for advisers, particularly where service income is derived through companies, trusts and other professional practice arrangements. As trust taxation settings continue to evolve, advisers should revisit existing structures to determine whether they remain effective and sustainable. In doing so, consideration should be given not only to PSI attribution risks, but also to the increasing relevance of anti-avoidance provisions and trust taxation reforms. This session will provide a practical and timely update on: • A refresher on the PSI and PSB rules, including common areas of uncertainty and adviser pitfalls • PSBs and Part IVA, with a focus on the ATO's compliance approach in PCG 2025/5 • Risk assessment and practical strategies to review and mitigate compliance risk ahead of 30 June 2027; and • The interaction between the PSI regime and proposed minimum tax rules for discretionary trusts, and the implications for professional service structures.



Technical program

Day 2 Friday, 5 March 2027 continued

Time	Session
10:30–11:00am	**Morning tea**
11:00am–12:00pm	**Session 8: Holiday Homes or Rental Properties: Navigating the New Deduction Rules** **Speaker: Brad Loftus, RSM Australia** The ATO's updated guidance on rental property deductions introduces important considerations for property owners and tax advisers, particularly where holiday homes are also used for private purposes. This session will explore the tax treatment of holiday rental properties, the distinction between genuine income-producing rentals and private holiday homes, and the practical impact of the changes applying from 1 July 2026. Key discussion points include: • When a holiday home qualifies as an income-producing rental property • Deductibility and apportionment of expenses for mixed-use properties • The ATO's approach to private use, peak-season availability and compliance risks; and • Key considerations for advisers and property owners from 1 July 2026.
12:00–1:00pm	**Workshop 2: Navigating the Minimum Tax Trust Regime** **Speakers: Amy Lancaster, Cowell Clarke, Joshua Pascale, Cowell Clarke** This workshop addresses the proposed minimum 30% tax on discretionary trusts, and will navigate the various tips and traps involved with the proposed new regime in a case study format. Topics covered in the workshop include: • The mechanics of the proposed new measures • The key planning issues and rollover opportunities for private groups pre-1 July 2028 • Carve-outs from the measures and the "excluded election trust" regime; and • Ongoing structuring issues, and where to from here.
1:00–2:00pm	**Lunch**

Technical program

Day 2 Friday, 5 March 2027 continued

Time	Session
2:00 – 3:00pm	**Workshop 2: Navigating the Minimum Tax Trust Regime** **Speakers: Amy Lancaster, Cowell Clarke, Josh Pascale, Cowell Clarke** *Workshop 2 continued ...*
3:00 – 4:00pm	**Session 9: International Tax Essentials: A Practical Guide for SME Advisers** **Speakers: Stefan Bratis, KPMG, Jacqui Tucker, CTA, KPMG** With cross-border transactions and offshore investments becoming increasingly relevant to SMEs, understanding international tax obligations is an important consideration for tax advisers. This session explores key tax residency issues, the implications of overseas business activities and trust beneficiaries relocating overseas, alongside the fundamentals of transfer pricing and international tax compliance. Key discussion points include: • Tax residency considerations for individuals and businesses • Tax implications of moving businesses or investments offshore • Trust beneficiaries relocating overseas and the implications for trustees • Transfer pricing fundamentals and related-party international transactions • Cross-border structuring and multinational compliance obligations; and • Common international tax risks and when to seek specialist advice.



Presenters

Caitlin Ashworth, CTA, 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.

Stefan Bratis is a Director in KPMG's Mid-Market & Private Business Tax Advisory practice, specialising in corporate income tax and international tax matters. Drawing on experience that spans advising start-ups through their growth journey and serving as a tax manager within an ASX top 100 listed company, he provides practical, commercially focused advice on complex tax issues and compliance obligations. At KPMG, Stefan manages a diverse portfolio of clients, including large private groups, inbound and outbound multinationals and ASX-listed companies, while also advising on mergers and acquisitions, restructures and broader transaction-related matters.

Michael Butler, CTA (Life), is the Partner in charge of the Finlaysons Tax & Revenue Group. He 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.

Dr Darryl Cross of Institute for Leadership Coaching is a clinical and organisational psychologist with over 45 years experience as a psychologist, including a decade lecturing at two interstate universities as well as being a sessional lecturer in the MBA program at both the former University of South Australia and Torrens University. He is also an accredited personal and executive coach, having coached for over 25 years in businesses both in Australia as well as internationally. Darryl is a Fellow of the Australian Psychological Society and a Graduate Member of the Australian Institute of Company Directors. He is also an Accredited Advisor to the Family Business Association.

Connor Eglinton is a Senior Associate at HWLE Lawyers. Connor advises on all aspects of federal and state taxation law, with a particular interest in business restructures and commercial transactions, as well as trust law and succession planning. Connor also has significant experience advising not-for-profit organisations in relation to charity registrations, tax concessions, restructures and governance matters.

Paul Ingram, CTA, is a Senior Legal Counsel at Minter Ellison and practises in all areas of taxation law, but with a particular focus on CGT, business structures, GST and stamp duty. He is the Deputy Chair (SA) of the of the Taxation Committee of the Law Council of Australia, as well as a member of The Tax Institute National Not-for-Profit Technical Committee. Paul previously (and for some years) represented The Tax Institute at RevenueSA's SA State Taxes Liaison Group.

Daniel Kedzior is an Associate in CCK Lawyers Transactions team. He advises clients across a broad range of taxation, corporate and commercial matters, with particular experience in tax advisory, business structuring, commercial transactions and the taxation issues that arise throughout the lifecycle of a business. He also has particular experience advising charities and not-for-profit organisations. Daniel assists clients with Australian Charities and Not-for-profits Commission registrations, endorsements and ongoing regulatory matters, together with the governance, structuring and commercial arrangements required for their operations. He advises on a range of federal and state taxation matters, including transaction structuring, capital gains tax, land tax, payroll tax, self-managed superannuation funds and the tax consequences of business and ownership restructures.

Amy Lancaster is an Associate 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. She assists clients in various matters including preparing complex advice, obtaining ATO Private Binding Rulings and implementing private group restructures.

Brad Loftus is a Partner at RSM Australia, and has over 25 years experience in the accounting industry, providing strategic business and taxation advice to clients across a broad range of sectors, with a particular

Presenters

focus on childcare and agribusiness. He specialises in business structuring, strategic planning, acquisitions and divestments, tax compliance and business advisory services. Brad works closely with clients at every stage of their business journey, from establishment through to succession and retirement, delivering practical solutions that improve profitability, protect wealth and optimise tax outcomes.

Sonia Mascolo, CTA, is a Tax Partner at Bentleys in Adelaide. She advises clients in a wide variety of areas, including tax technical business/structuring, succession planning and wealth management strategies, international tax issues, indirect tax and state taxes. Sonia has tax experience working in the legal profession, the ATO, a Big 4 firm as well as university lecturing and tutoring positions. She joined The Tax Institute in 2012 and is a current member of the SA Technical Committee.

Neil Oakes, CTA, is a Tax Director at Perks Chartered Accountants and holds a masters degree in Tax Law from UNSW (Atax). He currently heads up the Technical Tax consulting division within Perks. Neil specialises in providing commercially focused tax advice to a wide range of clients.

Joshua Pascale is an Associate Director in Cowell Clarke's Tax and Revenue and Superannuation groups. He 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. Joshua also advises on and assists in the implementation of group restructures and the associated succession planning (private and business). He is a co-author of The Tax Institute's SMSF Income Stream Guide.

Tim Sandow, CTA, has over 30 years of experience as a tax professional, including 25 years in the Big 4 firm. He provides income tax-related advice to a variety of private and large public companies as well as multinationals. He has advised on mergers and acquisitions, tax governance, corporate tax, international tax and employment tax issues. Tim is also the Partner leading BDO's National Tax Risk & Ethics group. Tim is a CTA of The Tax Institute and a Chartered Accountant Fellow and the SA representative on the National Board of The Tax Institute. Tim is the current President of The Tax Institute and a regular presenter at numerous Tax Institute conferences and events.

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

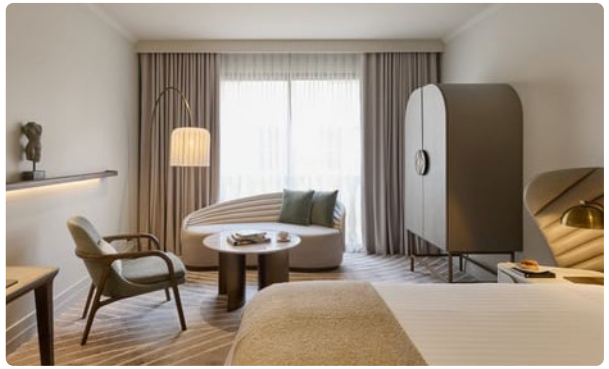
Richard Storey is a financial crime risk and compliance expert with a strong consulting pedigree, supporting clients to solve complex regulatory challenges across accounting, property, legal, banking, gambling, digital finance, and funds management sectors. With close to 30 years of experience, Richard has worked across private sectors including as Anti-Money Laundering Compliance Officer at a publicly listed organisation, Partner at a well-known consulting firm, and Associate Partner at a global consulting firm. He has led teams delivering enterprise-wide AML/CTF risk assessments, independent reviews, remediation programs, and regulator engagement strategies.

Jacqui Tucker, CTA, is the Head of Employment Taxes & Reward, KPMG Enterprise – the part of the KPMG practice that focuses on the mid-market. She has substantial experience advising a wide range of clients on expatriate and employment taxes. Jacqui advises extensively on employer obligations, including FBT, payroll tax and superannuation, with a focus on policy, process improvement and cost savings. She has wide experience in the design and implementation of equity-based compensation for employers with broad and varying attributes, including consideration of global equity schemes. In recent years, Jacqui has focused on private, start-up and high-growth businesses.

Venue and accommodation







The Playford Hotel Adelaide

120 North Terrace, Adelaide SA 5000

Located in the heart of Adelaide's cultural precinct, The Playford presents a contemporary take on the elegant Art Nouveau era depicted through its unique South Australian art, décor and bespoke customer service.

Getting there

The Playford is approximately 9 kilometres from Adelaide Airport, a short 15–20-minute commute by car.

Attendees have access to a variety of travel options, including taxi, rideshare, private vehicle or public transport.

- **Train:** Adelaide Railway Station is just a few steps away from the hotel.
- **Tram:** The tram stop serving the city and heading toward Glenelg departs from right outside the hotel.
- **Bus:** Adelaide Central Station/Franklin Street bus station is located about 600 metres away.

Parking

Car parking is available in The Playford car park located on Victoria Street, opposite the hotel. Self-parking is available for $30 per night, subject to availability.

Accommodation

Favourable room rates have been negotiated and secured at The Playford Hotel Adelaide. Accommodation bookings can be made by clicking here.

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.

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 forum 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 forum.

Special dietary and accessibility requirements

Please indicate any special dietary requirements at the time of registration. Please email us with any accessibility requirements at nationalevents@taxinstitute.com.au.

Networking function

A networking function will be held directly following the last session on Thursday from 5:30pm at The Playford Hotel Adelaide. The networking function is included in the forum 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/ forum lunches	Forum networking function*
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 function can be purchased on the registration form.

Register now!

Register online ▶

Register via form ▶
included in this brochure



Discounts

Early bird registration

All registrations received and paid on or before Friday, 5 February 2027 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.

The Tax Institute

SA Tax Forum
Registration form

45306 | WD

A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain the original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

1 Registration

Please see page 15 for registration inclusions.

Full registration – 13 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before 5 February 2027	☐ $1,695	☐ $1,695 plus pro rata* Affiliate membership until 30 June 2027. (*Approx $53 per month)	☐ $1,995
Standard registration Register after 5 February 2027	☐ $1,895		☐ $2,195

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

Networking function

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

Thursday, 4 March at The Playford Hotel Adelaide

☐ Yes, I WILL be attending the networking function OR

☐ No, I WILL NOT be attending the networking function

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

No. ☐ x tickets at $80 each: $ ☐

Dietary requirements:

2 Delegate contact details

Member no.:

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

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

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

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

***Become a member and save!**

Not a member of The Tax Institute yet? Sign up for membership until 30 June along with your event registration and:

- Save $300 of your event registration
- Access other member-only discounts in the future
- Access all member-only technical resources.

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

JOIN TODAY

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

Signature:

Date of signature: DD/MM/YYYY

3 Payment summary

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

4 Payment method

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

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

☐ **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'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

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The Tax Institute

SA Tax Forum Employer Ticket
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 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, 5 February	$3,450	$4,950	$6,450	
Standard after Friday, 5 February	$3,650	$5,150	$6,650	
Best for	SME	Mid-Tier	Corporate	Large/National
Flexibility	Your choice of 20 sessions	Your choice of 40 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 5 attendees	Up to 10 attendees	Up to 15 attendees	
Session formats	Face-to-face	Face-to-face	Face-to-face	
Networking	2 networking passes	5 networking passes	10 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 hour 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

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