Private Business
Tax Retreat

The Tax Institute



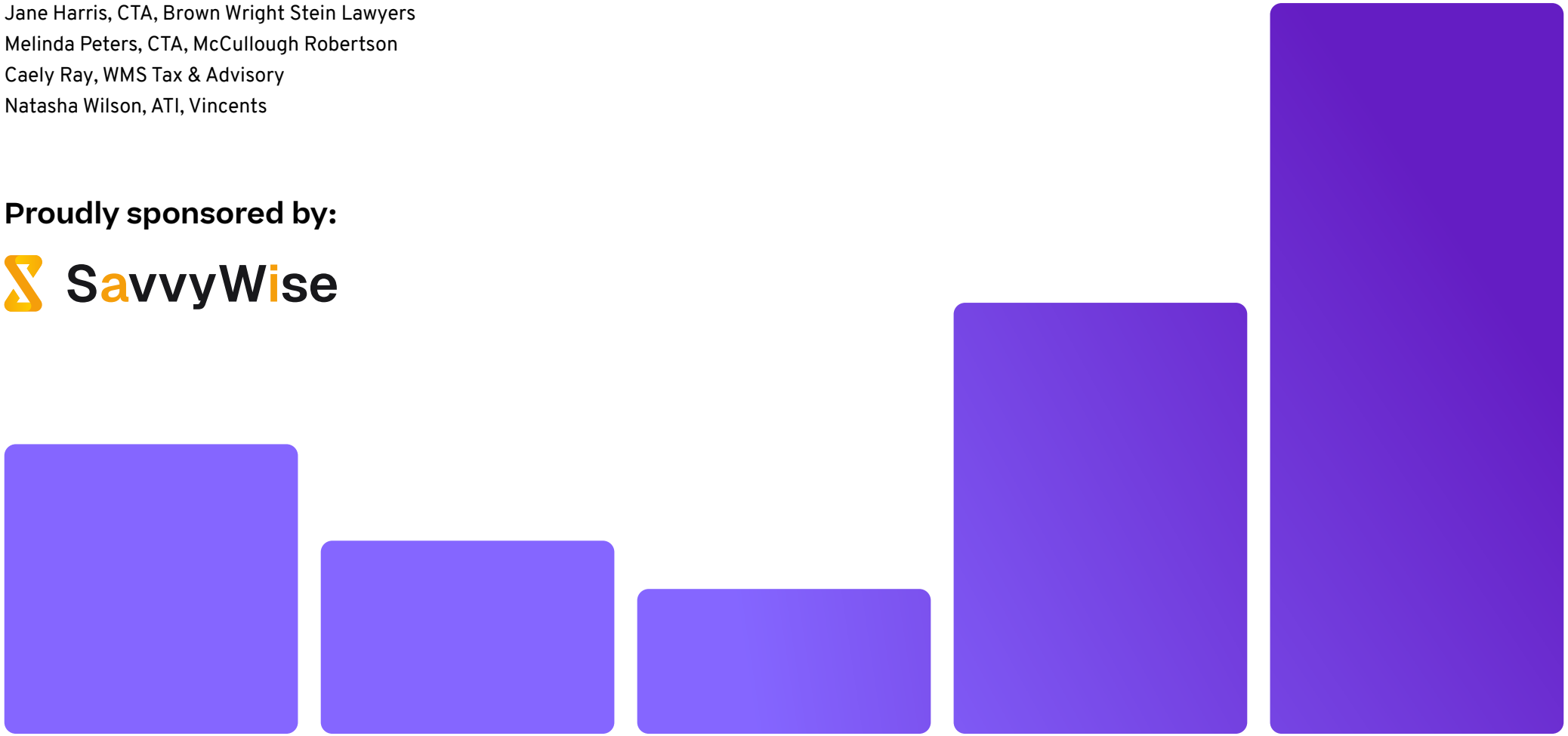
25-26 Feb 2027 | CPD 12

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

Jodie Robinson, CTA, McCullough Robertson, Chair, Retreat Organising Committee
Nicole Black, Bentleys QLD
Neil Brydges, CTA, Sladen Legal
Bruce Collins, CTA, Tax Controversy Partners
Billy-Jo Famlonga, FTI, Famlonga Business Services
Jane Harris, CTA, Brown Wright Stein Lawyers
Melinda Peters, CTA, McCullough Robertson
Caely Ray, WMS Tax & Advisory
Natasha Wilson, ATI, Vincents

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Welcome

The ultimate summer retreat for private business tax advisers

On behalf of the Organising Committee, welcome to the Private Business Tax Retreat, returning to the Gold Coast on 25 and 26 February 2027.

This year's theme, Surfing the Tidal Wave of Tax Issues, reflects what advisers to private businesses are dealing with every day: a steady flow of legislative change, sharper ATO scrutiny, and clients whose succession, trust and group structures are under more pressure than ever.

The forces reshaping private business tax

Developed by a committee of practitioners from across the legal and accounting professions, the program explores the wave of change reshaping private business advice. Across two days, leading experts will unpack the latest developments, examine their implications and share strategies to help you respond with confidence. Topics span the ATO's current focus areas, recent changes to trust taxation and their implications for trustee discretion, succession planning in light of Budget changes, family offices and the practical application of AI in private group practice. The program then delves into the technical detail, examining Bendel and Division 7A, SMSF structuring, CGT changes and their impact on property, and valuations. A closing panel will bring these themes together, exploring how to structure effectively in the wake of significant change.

Where complexity meets practice

The Private Business Tax Retreat is renowned for its technical depth, moving beyond headline developments to examine the detail, complexities and implications that matter in practice. Through in-depth technical sessions and timely discussions, you'll gain a clearer understanding of emerging issues, approaches to managing risk and opportunities to strengthen your advice. With 12 CPD hours on offer, you'll return to your practice with a sharper perspective on the issues shaping private business tax and the knowledge to put it to work for your clients.

Learn, connect and recharge by the coast

Set against the backdrop of the Gold Coast, the retreat offers a unique opportunity to step away from day-to-day demands and invest in your professional development. If you're joining us in person, you'll enjoy leading tax expertise in the atmosphere of a premium retreat, with the opportunity to build connections with peers from across Australia, exchange ideas and return to your practice re-energised and inspired.

Whether you join us in person or online, we look forward to welcoming you in February for what promises to be an engaging, insightful and rewarding experience.

We can't wait to welcome you to the Gold Coast for the 2027 Private Business Tax Retreat.

Early bird pricing offer
Register on or before Friday, 29 January 2027 to save!



Jodie Robinson, CTA
Chair, Retreat Organising Committee

Technical program

Day 1 Thursday, 25 February 2027

Time AEST	Session
8:00–8:45am	**Registration**
8:45–9:00am	**Welcome and President's Address** **Speakers: President, The Tax Institute, Jodie Robinson, CTA, Chair, Retreat Organising Committee**
9:00–10:00am	**Session 1: Opening Keynote – Understanding the Currents Beneath the Surface** The tax issues facing private businesses do not arise in isolation. Beneath every change in legislation, policy reform or commercial decision lie broader economic forces that influence business confidence, investment and growth. In this opening keynote, attendees will gain insight into the economic trends shaping Australia's private business landscape and the implications these developments may have in the years ahead.
10:00–10:30am	**Morning tea**
10:30–11:30am	**Session 2: Division 7A – UPEs, Reform and What Comes Next** **Speaker: Mark Molesworth, CTA, BDO** Division 7A is once again firmly in the spotlight. Following the High Court's decision in Bendel, renewed Government attention on unpaid present entitlements (UPEs) and the possible revival of previously announced Division 7A reforms, the landscape for private groups may be set for significant change. This session will examine where Division 7A currently stands, the practical implications for advisers and their clients, and what may lie ahead, including: • *Bendel* – the impact of the decision, where the law now stands and emerging compliance risks • The Government's proposed legislative response in relation to UPEs • Revisiting the 2018 Budget Division 7A reform proposals and where those measures now stand • The implications of any new Division 7A legislation, consultation or announcements ahead of the 2027 Retreat; and • Practical considerations for advisers in managing existing and future Division 7A loans and UPE arrangements.
11:30am–12:30pm	**Session 3: Keeping Your Balance – Trustee Decisions in a Changing Tax Landscape** **Speaker: Matthew Sealey, FTI, PwC Australia** Trustee powers and discretions are facing increased scrutiny as trust law, duty provisions and tax measures continue to evolve across jurisdictions. This session examines the practical implications of recent and proposed changes, including beneficial ownership elections, trustee obligations, and the interaction between trust decisions and transfer, landholder and state-based duty regimes. Through a review of common traps, emerging issues and real-world examples, delegates will gain practical guidance on navigating trustee discretion, beneficiary nominations, trust variations, year-end resolutions and the broader duty consequences that may arise.

Technical program

Day 1 Thursday, 25 February 2027 continued

Time AEST	Session
12:30 – 1:30pm	**Lunch**
1:30 – 2:30pm	**Session 4: Don't Get Caught in the Rip – Succession Planning in the New World** **Speaker: Hayley Mitchell, McCullough Robertson** With significant trust reforms on the horizon, succession planning strategies may need to be reconsidered well before the 1 July 2028 commencement date. This session explores how the proposed changes could affect the transfer of wealth and control between generations, the ongoing role of testamentary trusts and the treatment of deferred gains. Delegates will examine practical considerations when structuring succession plans, selecting beneficiaries and preparing for future distribution and estate outcomes, ensuring today's decisions remain effective long after the next wave of reform arrives.
2:30 – 3:00pm	**Afternoon tea**
3:00 – 4:00pm	**Session 5: Between the Flags – Using AI Safely in Tax Practice** **Speaker: Billy-Jo Famlonga, FTI, Famlonga Business Services** AI is the wave every tax practice is watching. This session shows how to ride it while staying between the flags. It isn't another AI hype session. It takes a practitioner's view of what it takes to set AI up properly in a smaller practice, and how that differs from a large firm. It covers the TPB's new guidance on AI and the Code of Professional Conduct, client confidentiality and consent, keeping records of AI use, the ATO's access powers, and what's coming over the next year. Then it's time to get wet. We put AI through its paces live on stage, tackling the kind of curly tax questions you face every day, and check every answer against the law. Expect some impressive rides, and at least one wipeout.



Technical program

Day 1 Thursday, 25 February 2027 continued

Time AEST	Session
4:00 – 5:00pm	**Session 6: Private Groups and Family Offices – Are Your Arrangements Fit for Purpose and Ready for Scrutiny?** **Speaker: Rachel Witte, KPMG** Your client's private group or family office may run smoothly, but would its service arrangements, intra-group transactions and tax controls stand up to scrutiny? For those advising complex private groups and family offices, the challenge is turning governance principles into arrangements that work in practice and can be supported with evidence. This session takes a closer look at the decisions, documentation and controls that matter. This session will cover: • Moving beyond the governance framework: what effective internal controls look like in practice • Revisiting service arrangements and intra-group transactions: what needs to be documented and supported • Lessons from the SNA Group case and questions to ask about existing and new arrangements • Clarifying responsibilities for tax decisions, approvals and oversight; and • Identifying gaps between documented arrangements and what actually happens.
5:00 – 7:00pm	**Networking reception**



Networking reception

Join your colleagues, peers and our esteemed presenters for an evening of cocktails, canapes and networking.

The networking reception will be held at The Langham on Thursday evening directly following the last session of the day. Celebrate the start of the retreat with a sparkling evening under the stars, surrounded by good company, fresh sea breezes and the relaxed Gold Coast vibe.

Date: Thursday, 25 February 2027
Time: 5:00–7:00pm AEST
Venue: The Langham Gold Coast
Price: Inclusive for all full registration delegates
$80 for additional tickets – see registration form for details
Dress: Business casual

Technical program

Day 2 Friday, 26 February 2027

Time AEST	Session
8:30 – 9:30 am	**Session 7: Riding the Super Swell – The SMSF's Place in the Private Group** **Speaker: Phil Broderick, CTA, Sladen Legal** With a steady run of reform hitting the superannuation system, many clients are considering whether their SMSF still earns its place in their private group structure, but what does that mean for SMSF's once the dust settles? The session works through the changes reshaping SMSF advice, including: • Balancing the Division 296 changes against the backdrop of the change to the taxation of trusts generally • The ATO's increased scrutiny on SMSF investments in unrelated companies and unit trusts • The impact of recent developments on limited recourse borrowing arrangements; and • The announced changes to registering an SMSF and submitting the fund's investment strategy. You'll leave with a practical framework for advising clients on whether, and how, to use an SMSF in their structure going forward.
9:30 – 10:30am	**Session 8: Reading the Conditions – ATO Focus Areas for Private Groups** **Speakers: Bruce Collins, CTA, Tax Controversy Partners, ATO representative to be announced** What issues are attracting the ATO's attention and what should advisers be preparing for next? This fireside chat brings together experienced practitioners to discuss current compliance priorities, emerging risk areas and practical observations from across the private group sector. Expect a candid conversation on what is happening now, what may be coming next and how best to navigate an increasingly complex tax landscape.
10:30 – 11:00am	**Morning tea**



Technical program

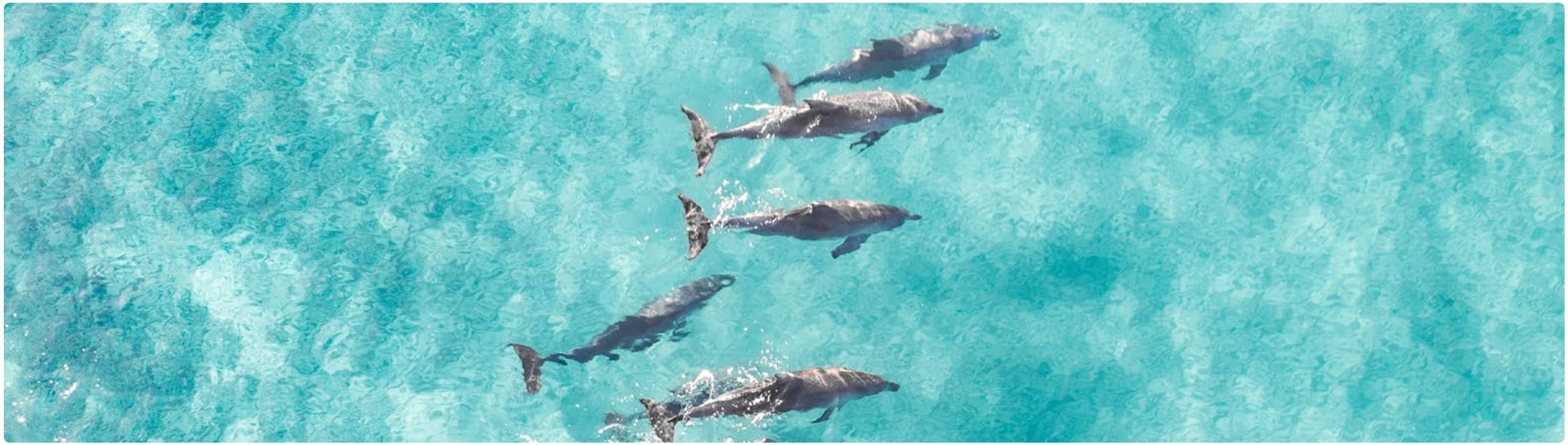
Day 2 Friday, 26 February 2027 continued

Time AEST	Session
11:00am–12:30pm	**Session 9: Hot Topics Round-Up** **Part I: CGT Changes – Follow the Asset, Understand the Outcome** **Paul Banister, CTA, Grant Thornton** With significant tax reforms on the horizon, advisers need to understand both the technical detail and the practical implications for clients. This session will explore: • The proposed categories of capital gains and how they will operate in practice • Key challenges and opportunities arising for clients and advisers • Practical compliance, record-keeping and valuation considerations; and • Planning opportunities and critical actions to consider before 30 June 2027. **Part II: Negative Gearing – Follow the Loss, Understand the Outcome** **Thomas Aitkenhead, Hoffman Kelly** Your client has an excess rental loss today and a potential capital gain tomorrow. How do the negative gearing changes connect the two, and can you confidently explain the outcome? This practical, case study-style session moves beyond the headlines to work through the interaction between rental losses and capital gains. Follow the numbers as we explore how different property scenarios affect the treatment of excess deductions, the use of carried-forward losses and the eventual outcome on disposal. Designed for advisers who want to turn technical changes into clear client conversations, this session will help you identify the questions, calculations and records that matter. This session will cover: • Understanding which property arrangements are affected and where transitional rules matter • Tracking excess rental deductions: what happens to amounts that cannot be used immediately • Working through the interaction between quarantined carried-forward losses and eligible capital gains • Comparing case studies to identify how different circumstances change the outcome; and • Translating the calculations into clear explanations for clients.
12:30–1:30pm	**Lunch**

Technical program

Day 2 Friday, 26 February 2027 continued

Time AEST	Session
1:30 – 2:30pm	**Session 10: Finding Your Footing – Valuations Amid Tax Change** **Speaker: Scott Birkett, BDO, Mark Whittaker, BDO** With proposed CGT and superannuation reforms placing greater emphasis on asset values, valuations are becoming an increasingly important consideration for advisers and their clients. This session will explore: • Why valuations are set to become a key focus area over the next 18 months • Valuation challenges arising from proposed CGT and superannuation changes • How to brief a valuer, what information is required and likely cost considerations • Historical valuations and the options available where a valuation was not obtained at the relevant time • The ATO's expectations and emerging guidance in this area; and • Practical tips for obtaining and relying on valuations with confidence.



Technical program

Day 2 Friday, 26 February 2027 continued

Time AEST	Session
2:30 – 3:30pm	**Session 11: Structuring After the Wave of Tax Changes – A Practical Perspective** **Panellists: Julie Abdalla, FTI, The Tax Institute, Stephen Holmes, CTA, WMS Tax & Advisory** **Facilitator: Jodie Robinson, CTA, McCullough Robertson** The 2026 federal Budget announced a 30% minimum tax on discretionary trusts from 1 July 2028, which in conjunction with the CGT and negative gearing changes, are arguably the biggest changes in the Australian taxation landscape in nearly 30 years. These changes mean that bucket companies are dead and almost every client you have with assets in a trust will need to restructure over the next three years. Having heard the technical detail earlier in the program, this panel session turns to the question every adviser should be thinking of right now: what should I be doing now to assist my clients in preparing for these changes? Taking a deliberately practical approach, the session explores the discussions you should be having with your clients now to plan for the transition, the restructuring options available and the tax and non-tax factors that drive structuring decisions. The panel session also revisits share classes, dividend streaming and franking, and the anti-avoidance rules that constrain them. The panel session will cover: • Trust 30% tax changes: a short recap of what is announced, what is legislated and what remains uncertain • The death of the bucket company • Planning ahead for 1 July 2028: a timeline, triggers and practical framework • Do you make the Excluded Election Trust (EET) election (fix the trust)? • Structuring from a practical point of view: options available and tax implications + non-tax considerations (asset protection, succession, control and duty) • The questions clients are asking now • Share classes: how they work and what they can and cannot achieve • Dividend streaming: Division 204 of the ITAA 1997 and section 177E of the ITAA 1936; and • Franking: using and preserving franking credits in a changed environment.
3:30pm	**Retreat close and afternoon tea**

Presenters

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

Thomas Aitkenhead is a Chartered Accountant and Director at Hoffman Kelly. He has degrees in Commerce and Law and has over 20 years experience in public practice providing structuring and taxation solutions for SME businesses. Thomas has a special interest in the property industry and its ever-changing and complex nature. He enjoys finding practical solutions for his clients.

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

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

Bruce Collins, CTA, is the founder and principal solicitor at Tax Controversy Partners Pty Limited, currently helping clients to resolve all types of tax issues with the ATO and SROs, and for tax agents dealing with the TPB. Before moving into private practice in 2017, Bruce worked for over 35 years in the ATO, a third of this time as a Senior Executive in what is now the Compliance & Engagement Group, covering most ATO functions. Bruce led, coached and mentored many of the ATO's senior technical and compliance leaders in his role as a Senior Executive, in managing ethical requirements and helping other leaders and staff to develop their abilities to do so. Bruce was also involved in the project setting up the TPB, and in training its first tranche of civil investigators. Bruce has an Accounting Certificate (1989), a First Class Honours Degree in Law (1995), a Graduate Diploma in Legal Practice (1996), a Masters of Taxation (2003) and a Masters of International Taxation (2006). Bruce is a Chartered Tax Adviser, a member of the Law Society of New South Wales and their Revenue Law Committee, a member of the Australian Institute of Company Directors, and a member of the Law Council of Australia, its Tax Committee and is current Chair of their SME Committee.

Presenters

Billy-Jo Famlonga, FTI, is the founder and principal of Famlonga Business Services. With over 15 years industry experience, her practice focuses on taxation compliance, business structuring, succession planning, not-for-profits, and providing a comprehensive suite of additional services to the SME market including specialising in business technology and process automation. Billy advises clients across a diverse range of industries, including primary production, freight and logistics, digital assets, retail and the NDIS sector. Billy holds a Graduate Diploma of Applied Tax Law and is a Fellow Member of The Tax Institute and the Institute of Public Accountants. Billy serves as the current Vice Chair of The Tax Institute's WA State Council and is actively involved in many of WA's local working groups, including Women in Tax, Emerging Leaders and Local Engagement.

Stephen Holmes, CTA, is a Partner with WMS Chartered Accountants based on the Gold Coast. He specialises in all SME tax matters with a particular interest in the CGT small business concessions, tax-effective restructures and Division 7A. He is passionate about tax education and assistance for regional accountants. He is also a regular speaker for numerous professional bodies including The Tax Institute.

Hayley Mitchell of McCullough Robertson has extensive experience in all facets of wills and estates, including complex estate disputes, estate administration, succession planning for high-net-worth individuals and business entities, and superannuation succession matters. With specialist knowledge in both estate law and superannuation, she provides strategic, commercially focused advice tailored to clients' individual and business needs. Hayley is regularly engaged to advise on estate planning, probate and estate administration, contested wills and disputes involving superannuation death benefits, offering clear, practical guidance in often sensitive and complex matters. Hayley is an accredited specialist in succession law, an SMSF Specialist Advisor and a member of the Queensland Law Society's Specialist Accreditation Advisory Committee.

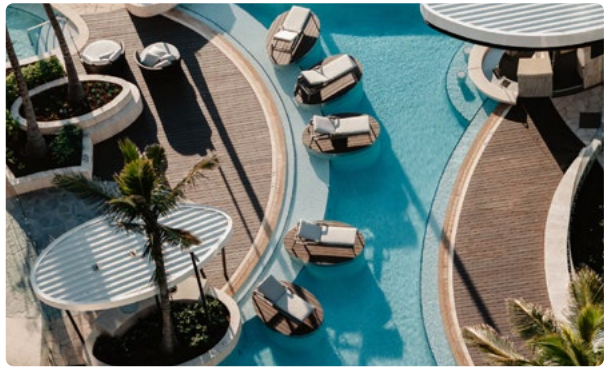
Mark Molesworth, CTA, is a tax partner at BDO and a member of The Tax Institute's SME Technical Subcommittee. Mark has many years of experience in advising taxpayers with respect to all areas of taxation, including CGT, FBT and income tax. He also provides taxation advice to other smaller accounting and legal practices in respect of their clients.

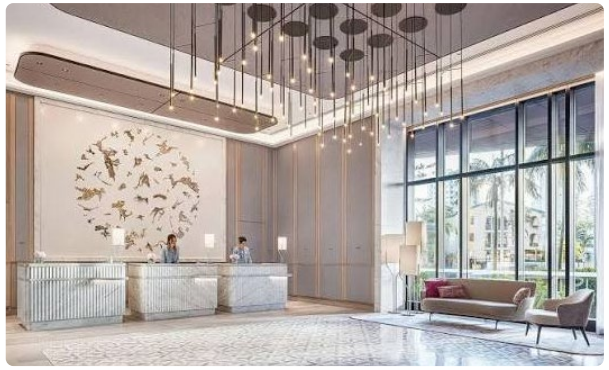
Jodie Robinson, CTA, is an Accredited Tax Law Specialist and Special Counsel in the tax team with McCullough Robertson Lawyers. Jodie is passionate about providing clients with results-driven, commercial advice and solutions for their taxation and business needs. Jodie regularly advises on the tax consequences of the sale of significant businesses, business restructures, including applicable rollovers and duty exemptions, and holding company interpositions. Jodie also assists clients and their advisors in obtaining private binding rulings and dealing with payroll tax self-review audits.

Matthew Sealey, FTI, is a Partner at PwC Australia focusing on state tax advice and disputes. He has over 25 years experience in this area, including nearly a decade at the NSW Bar, where he appeared in many state tax cases.



Venue and accommodation







The Langham Gold Coast

38 Old Burleigh Rd, Surfers Paradise QLD 4217

Rising above one of Australia's most coveted coastlines, The Langham, Gold Coast and Jewel Residences managed by The Langham celebrates a new wave of luxury in the heart of the Gold Coast. Nestled between the vibrant neighbourhoods of Surfers Paradise and Broadbeach, the coastal destination marks Queensland's first new beachfront property in more than 30 years.

Getting there

The Langham Gold Coast is located approximately a 1 hour and 30-minute drive from Brisbane Airport or around 30 minutes from Gold Coast Airport.

The hotel is conveniently located 600 metres from the tram and 300 metres from the bus.

Parking

Complimentary self-parking is offered to guests staying at the hotel, while valet parking is available at a cost of $60 p/day.

Accommodation

Favourable room rates have been negotiated and secured at The Langham, Gold Coast. Accommodation bookings can be made by following the link on the event web page or via this link.

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 conference counts for 12 hours of CPD with The Tax Institute.

The Tax Institute's attendee hub

This event will be accessible to all delegates via our dedicated attendee hub. Program information, materials (technical papers and presentations), survey forms and more will be available via The Tax Institute's virtual attendee hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the attendee hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual attendee hub by email.

Delegate list

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

Dress code

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

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

A networking reception will be held directly following the last session on Thursday from 5:00pm at The Langham, Gold Coast. The networking function is included in the conference registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of $80. Please indicate your requirements, including dietary requirements, at the time of registration.

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 National 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	Networking reception*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Online full registration This registration option entitles one delegate to access the entire event virtually.	✓		

*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 the early bird date will be entitled to an early bird discount.

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

Group discounts

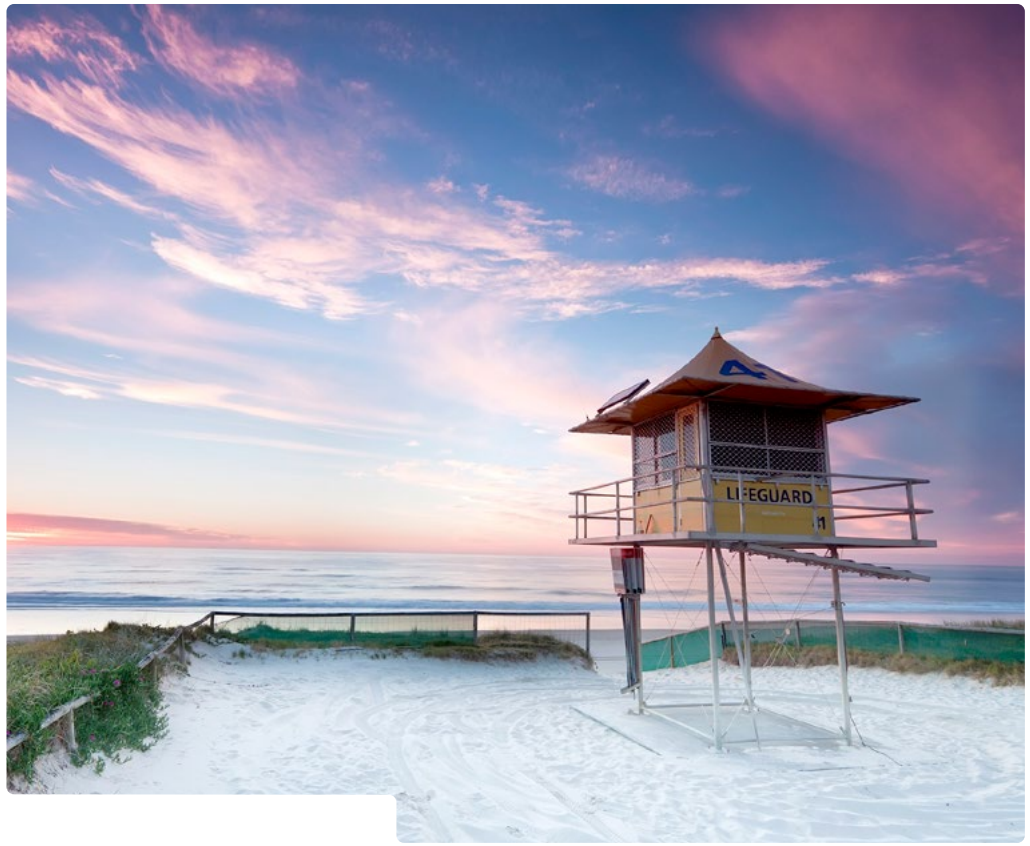
Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

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

Private Business Tax Retreat
Registration form

45313 | 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 – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 29 January 2027	☐ $1,795	☐ $1,795 plus pro rata* Affiliate membership until 30 June 2027. (*Approx $53 per month)	☐ $2,095
Standard registration Register after Friday, 29 January 2027	☐ $1,995		☐ $2,295

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

Online Full Registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 29 January 2027	☐ $1,795	☐ $1,795 plus pro rata* Affiliate membership until 30 June 2027. (*Approx $53 per month)	☐ $2,095
Standard registration Register after Friday, 29 January 2027	☐ $1,995		☐ $2,295

☐ 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 conference.

Thursday, 25 February 2027 at The Langham Gold Coast

☐ 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 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.

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 reception ($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.

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