

# National Superannuation Conference

31 October–1 November 2024

Crown Sydney

12 CPD hours



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

Brad Ivens, ATI, EY & Chair, Conference Organising Committee

Phil Broderick, CTA, Sladen Legal

Daniel Butler, CTA, DBA Lawyers

Dinh Dinh Dang, Deloitte

Nidal Danoun, Prosperity Financial Services

Jeremy Geale, CTA, MinterEllison

Daryn Loo, Cbus

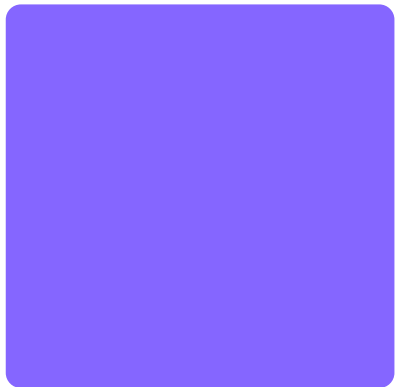
Nick Panos, CTA, N Panos & Associates Solicitors

Jemma Sanderson, CTA, Cooper Partners Financial Services

Shirley Schaefer, BDO

Allister Sime, CTA

Ross Stephens, CTA, KPMG





**Early bird pricing offer**  
**Register on or before Friday 4 October to save!**

# Welcome

On behalf of The Tax Institute and the Organising Committee, it is my pleasure to invite you to attend the 2024 National Superannuation Conference. This year sees the conference heading north to Sydney and it will be held as an in-person event at the Crown Sydney on 31 October and 1 November 2024.

Now in its 12th year the conference has long been recognised as the premier event for tax specialists in the superannuation industry, uniquely dealing with the tax issues impacting both the large fund and self-managed superannuation fund sectors.

It's been another eventful year with numerous changes to digest. Some of these are superannuation tax specific whereas others are broader taxation or superannuation regulatory and industry developments. All of this in an environment of ongoing economic and geopolitical uncertainty.

Our National Superannuation Conference has always been at the cutting edge of the issues facing the industry today and into the future, providing insights and diverse perspectives, to ensure our attendees stay on top of all the latest developments in superannuation, particularly where they relate to tax.

This year's program will again bring together regulators and leading practitioners from the legal, accounting, audit and financial advisory services fields of the superannuation industry. Over two full days they will explore a myriad of tax related challenges impacting the superannuation system, and the opportunities that these might present. The line up of speakers includes leading superannuation and tax experts with the essential blend of knowledge and experience in the practical application of the laws. A mixture of plenary sessions and two streams of breakout sessions are offered. Delegates can pick and choose breakout sessions from either stream.

In addition to the outstanding technical content, the program has been designed to also enable you to network and relax with colleagues and peers, and conference registration includes attendance at the networking function on Thursday 31 October at the Crown Sydney.

I encourage you to register your attendance on or before Friday 4 October to receive the early bird discount and ensure your place.

Finally, I would like to take the opportunity to thank the organising committee for their hard work in putting this exceptional program together.

I look forward to seeing you there.



**Brad Ivens, ATI**  
Chair, Conference Organising Committee

# Technical program

**Day 1** Thursday, 31 October 2024

Time	Session	
8:00–9:00am	Registration	
9:00–9:30am	<p>Welcome and Opening address            Speaker: Brad Ivens, ATI, EY and Conference Organising Committee Chair</p>	
9:30–10:30am	<p>Session 1: Economic update – Landing the Australian economy on the narrow path            Speaker: Jo Masters, Barrenjoey</p> <p>The Australian economy continues to face a complex set of headwinds, both cyclical and structural – from inflation to the housing crisis, rate hikes to tax cuts. Can we expect a smooth ride in the year or two ahead?</p>	
10:30–11:00am	Morning tea	
Time	Large Fund Stream	SMSF Stream
11:00am–12:00pm	<p>Session 2A: Emerging Issues for Large Funds            Speakers: Jamie Barnes, PwC, Marco Feltrin, PwC</p> <p>This session will examine a series of developing and anticipated issues impacting the large superannuation fund sector.</p>	<p>Session 2B: Div 296 tax – the new super tax            Speaker: Liz Westover, FTI, Deloitte</p> <p>Australians with super balances above \$3 million will soon be impacted by the introduction of this new tax. With a commencement date of 1 July 2025, do we need to start planning now? Is action needed prior to commencement or is any action needed at all?</p> <p>This session will discuss the mechanics and workings of the new Division 296 tax including developments throughout the legislative process. Importantly, she will go through planning opportunities and the key issues to discuss with clients.</p>
12:00–1:00pm	<p>Session 3A: ATO update            Speakers: Andrew Grace, Australian Taxation Office, David Kasmarik, Australian Taxation Office</p> <p>In this session, the ATO will provide an update on its Justified Trust assurance programs and highlight current industry focus areas.</p> <p>The presentation will be followed by a facilitated Q&amp;A.</p>	<p>Session 3B: Super contributions recap and refresh            Speaker: Craig Day, Colonial State</p> <p>This session gets under the hood of the super contribution rules and explores how the rules work, current strategy and the common traps and pitfalls to be aware of. Topics covered include:</p> <ul style="list-style-type: none"> <li>• Cap indexation – the implications and planning considerations</li> <li>• When and how contributions can exceed the caps</li> <li>• Personal deductible contribution common mistakes and how to avoid them</li> <li>• Dealing with excess contributions and the timing; and</li> <li>• Division 296 tax and contributions – their impact and do you, or don't you.</li> </ul>

# Technical program

**Day 1** Thursday, 31 October 2024 continued

Time	Large Fund Stream	SMSF Stream
1:00 – 2:00pm	Lunch	
2:00 – 3:00pm	<p><b>Session 4A: Domestic Investment</b> Speakers: Darius Lalkaka, CTA, HESTA, Neil Lamb, ATI, KPMG</p> <p>This session will explore ongoing developments affecting domestic investments by large superannuation funds. The session will focus on recent tax developments for these investments, and on the impact on the governance arrangements for funds and the impact on members in relation to these investments, including through the lens of a head of tax.</p>	<p><b>Session 4B: SMSF internal disputes and how to resolve and avoid them</b> Speaker: Phil Broderick, CTA, Sladen Legal</p> <p>As the SMSF system matures we are seeing more and more disputes between members and trustees. Disputes can involve members wanting to exit, decisions around investments, death benefit disputes and one of the member/trustees going rouge.</p> <p>This session will discuss real life examples of SMSF internal disputes as well as tools for resolving, and preventing, such internal disputes.</p>
3:00 – 4:00pm	<p><b>Session 5A: Tax Governance</b> Speakers: Kara Singleton, Deloitte, David Kasmarik, Australian Taxation Office, Aaron Bennett, Australian Taxation Office</p> <p>This engaging panel session will cover the latest developments and expectations in the tax governance landscape from the ATO and advisor perspective, including:</p> <ul style="list-style-type: none"><li>• The recently announced top 1000 differentiated approach and how this might apply to the industry in practice; and</li><li>• Third-party tax control expectations given that the transition period has now lapsed.</li></ul>	<p><b>Session 5B: Pension issues – The constants among the changes</b> Speaker: Peter Crump, CTA, BDO</p> <p>Navigating pensions is a complex process with much to consider. This session will look at the issues around pensions and will provide tips and traps when starting (or stopping) a pension and will look at:</p> <ul style="list-style-type: none"><li>• Starting, stopping and restarting pensions</li><li>• Transition to retirement pensions; and</li><li>• Legacy pensions.</li></ul>



# Technical program

**Day 1** Thursday, 31 October 2024 continued

Time	Session
4:00–4:30pm	Afternoon tea
4:30–5:30pm	<b>Session 6: Case updates</b> Speaker: Shayne Carter, CTA, Nuwaru  This session will look at a number of recent cases that are of importance to the superannuation industry and will identify matters that warrant consideration by trustees and advisers.
5:30–7:30pm	Conference Networking Function



## Conference Networking Function

Join your colleagues and conference speakers for an evening of canapes, drinks and networking.

**Date:** Thursday, 31 October 2024

**Time:** 5:30–7:30pm

**Venue:** Crown Sydney

**Price:** Included for full registration delegates  
Additional tickets are \$80 per person, see registration form for details

**Dress:** Business or business casual

# Technical program

**Day 2**      Friday, 1 November 2024

Time	Session
8:30 – 9:00am	<b>Session 7: Tax Policy &amp; Advocacy update</b> Speaker: Julie Abdalla, CTA, The Tax Institute
9:00 – 10:00am	<b>Session 8: Meeting the retirement challenge</b> Speaker: Dr Geoff Warren, The Conexus Institute  Assisting Australians with their retirement needs is a big challenge currently facing the super industry. What is required is the capacity to deliver both personalised retirement solutions and guidance to all retirees at scale. This presentation will identify some of the key gaps in the retirement system, and suggest what super funds, financial advisers and policy makers might do to address them.
10:00 – 10:30am	<b>Morning tea</b>

Time	Large Fund Stream	SMSF Stream
10:30am – 11:30am	<b>Session 9A: International investments – United States update</b> Speakers: Daniel Fletcher, Ernst & Young LLP, Aparna Koneru, Ernst & Young LLP, Landon McGrew, Ernst & Young LLP, Daniel Mobruci, Australian Super  Just ahead of the presidential election on 5 November, this session will provide an overview of what the result might mean in terms of tax reforms and particularly in the context of inbound investment.  The session will also cover other recent and proposed developments affecting investments by large superannuation funds in the United States.	<b>Session 9B: Superannuation member balance strategies on death</b> Speaker: Jemma Sanderson, CTA, Cooper Partners Financial Services  Superannuation is often one of the largest assets upon death, with recent cases in this area highlighting the importance of getting the planning right prior to death. In this session, This session will consider: <ul style="list-style-type: none"> <li>• The implications of cases regarding superannuation and death benefits</li> <li>• The importance of documentation within an SMSF upon death and incapacity</li> <li>• Transfer balance cap strategies and considerations, particularly how indexation interacts</li> <li>• How the new Division 296 tax will impact estate planning arrangements</li> <li>• Dealing with properties and other “lumpy” assets when paying death benefits; and</li> <li>• The changing role of superannuation in estate planning.</li> </ul>

# Technical program

**Day 2** Friday, 1 November 2024 continued

Time	Large Fund Stream	SMSF Stream
11:30–12:30pm	<p><b>Session 10A: Financial Advice</b>  <b>Speakers:</b> Bernard Finnegan, CTA, KPMG, Victoria Yessayan, CTA, KPMG</p> <p>This session will explore technical and practical impacts from superannuation and tax law changes being introduced in response to various recommendations under the Quality of Advice Review, as well as other tax issues large superannuation funds face in providing financial advice to members.</p>	<p><b>Session 10B: Navigating the Complexities of Property Investments in SMSFs</b>  <b>Speaker:</b> Shelley Banton, ASF Audits</p> <p>This session will cover the latest regulatory updates, provide insights into the current landscape, and comprehensively risk manage related party transactions, in-house assets, NALI and the potential impact of Div 296.</p> <p>Attendees will gain insights from case studies, engage in in-depth discussions on complex scenarios, and learn how to optimise SMSF compliance through property investments. The presentation aims to enhance the expertise of SMSF professionals, enabling them to provide superior advice and achieve best practice outcomes for their clients.</p>
12:30–1:30pm	<b>Lunch</b>	
1:30pm–2:00pm	<p><b>Session 11A: Superannuation funds as Significant Global Entities</b>  <b>Speakers:</b> Kim Christy, CTA, EY, Tara Brennan, EY</p> <p>This session will highlight some of the challenges being faced by large superannuation funds and controlled entities in managing their SGE status, ranging from penalty exposures through to identifying and meeting additional compliance requirements.</p> <p>This session will include discussion on the new public country-by-country reporting measures which are expected to take effect from the year ending 30 June 2025.</p>	<p><b>Session 11B: ATO update</b>  <b>Speaker:</b> Paul Delahunty, Australian Taxation Office</p> <p>This session will provide an update on the Australian Taxation Office SMSF compliance focus for 2025 and will discuss:</p> <ul style="list-style-type: none"> <li>• What trends the ATO have identified in the past year; and</li> <li>• What are the key SMSF issues that are emerging.</li> </ul>





# Technical program

**Day 2**      Friday, 1 November 2024 continued

Time	Large Fund Stream	SMSF Stream
2:00pm – 3:00pm	<p><b>Session 12A: Members’ best financial interests</b>  Speakers: Philip Marquet, MinterEllison, Ruth Stringer, MinterEllison</p> <p>Pursuant to the ‘best financial interests’ covenant in the SISA Act, trustees must perform and exercise their duties and powers in the best financial interests of the beneficiaries. What does this mean for a trustee in managing the fund’s tax affairs?</p> <p>This session will consider whether under the best financial interests covenant a trustee is obliged to pursue optimal tax outcomes for members and how must a trustee take into account the risk that a tax position may be challenged by the ATO. The session will also examine considerations that should be taken into account in other common decisions made by trustees in managing their tax affairs.</p>	<p><b>Session 12B: ATO Audits – Practical tips and traps</b>  Speakers: Bryce Figot, DBA Lawyers, Shirley Schaefer, BDO</p> <p>If all goes well in an ATO audit of an SMSF auditor, the ATO may close their file. However, if the ATO is not satisfied, the ATO might refer the auditor to ASIC. ASIC then has the power to impose various outcomes, including public disqualification, suspension or imposing conditions on the auditor’s registration. Accordingly, there is tremendous importance in satisfying the ATO’s inquiries thoroughly and properly in a timely manner.</p> <p>This session will discuss various practical ‘tips’ and ‘traps’ that will prove invaluable for SMSF auditors including:</p> <ul style="list-style-type: none"> <li>• What SMSF auditors should be doing NOW ... long before any ATO audit</li> <li>• What prompt action you should take when first alerted to an ATO review or audit of your audit files; and</li> <li>• Most common areas where auditors come ‘unstuck’</li> </ul>
3:00 – 3:30pm	<b>Afternoon tea</b>	
3:30 – 4:30pm	<p><b>Session 13: The potential role of AI in the further growth of the Superannuation sector</b>  Speakers: Nidal Danoun, Prosperity Financial Services, James Mabbott, KPMG</p> <p>Technological advancements have been instrumental in supporting the growth of the Superannuation and financial services sector. Now due to the practical reality of the role of Artificial Intelligence (AI) in the future of technology, the sector is focusing on the question of what role AI will play in the future growth of the sector rather than whether it will play a role.</p> <p>In this session, our panel will address some of the topical issues on practitioners and business leaders’ mind including:</p> <ul style="list-style-type: none"> <li>• Practical ideas on the industrialise use of AI to remain relevant to and competitive.</li> <li>• Clarity of steps on the where, how and when; and</li> <li>• Relevant risk management and ethical considerations.</li> </ul>	
4:30pm	<b>Conference close</b>	

# Presenters

**Shelley Banton** is Head of Technical at ASF Audits and an accredited SMSF specialist auditor and advisor with over 15 years of experience in the superannuation industry. She is recognised Australia-wide as an expert on SMSF compliance, providing clients with high-level strategic and technical advice. She is a committee member of the ATO SMSF Auditor's professional stakeholders' group, a member of the SMSF Association National Conference Committee and Chair of the SMSF Association Audit Discussion Group. Shelley specialises in delivering quality SMSF training and education to the private and public sectors; she is a regular presenter at peak industry SMSF conferences and is a well-known author and sought-after industry commentator. In 2022, Shelley was awarded the SMSF Association's Chairman's Award, recognising her outstanding contribution to the SMSF sector.

**Jamie Barnes** is a Director within PwC's Financial Advisory team focussing on financial service tax advisory. Previously, Jamie was on a long term secondment to PwC UK, where he joined the Asset and Wealth Management team focusing on the EMEA Asset and Wealth Management industry including UK investor tax reporting and private equity taxation. Prior to the secondment, Jaime was a

Senior Manager in PwC's Melbourne Corporate Tax team. In the past few years, Jamie's focus has primarily been on fund and asset management clients assisting these companies across all investments aspects including asset acquisitions and disposals.

**Aaron Bennett** is the Acting Assistant Commissioner for the Private Equity Branch in Public Groups at the ATO and is responsible for leading the ATO's Collective Investment Vehicles strategy. Prior to taking up this role, Aaron was a Senior Technical Adviser and Acting Assistant Commissioner in the ATO's Tax Counsel Network. Aaron also has engagement and assurance experience from leading the ATO's managed investment trust assurance program, as well as policy and law design experience from his time working at Treasury.

**Tara Brennan** is a Senior Manager in EY's Financial Services Tax Practice, specialising in the Wealth and Asset Management sector. Tara works with large superannuation funds and fund managers, providing advice on a comprehensive range of income tax matters. Her experience includes the tax implications of offshore investments, successor fund transfers, management of member-related tax risks, Australian Taxation Office reviews and custodian transitions.

**Phil Broderick, CTA**, is a principal of Sladen Legal and heads its superannuation team. He is a member of a number of superannuation related committees. This includes being a member, and former chair, of The Tax Institute's superannuation committee and the chair of IFPA's superannuation technical and policy committee. He is also a member of a number of the ATO's superannuation liaison groups including the Superannuation Industry Relationship Network (SIRN) and the Superannuation Industry Stewardship Group (SISG). Phil is also heavily involved in liaising with Treasury and ATO in relation to the implementation of new super 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 2020 to 2024 editions of Best Lawyers Australia for superannuation law. Phil was also listed as recommended for tax law in the 2021 Doyles guide and was the winner of the SMSF Association's SMSF Specialist Advisor (SSA) Top Achiever Award in 2019.

**Shayne Carter, CTA**, is a Partner in Nuwara's Corporate Tax team. Shayne has a strong background in leading tax advisory practices (including 20 years

as a Partner of Greenwoods and Herbert Smith Freehills) with deep knowledge and experience in the taxation of superannuation/ income streams and insurance products. He was formerly Adjunct Lecturer on Superannuation at the University of Sydney and lectured on superannuation in the Masters of Tax / Masters of Law course over a 20-year period. Shayne has dealt with all types of stakeholders in this space including Trustee Directors, Regulators (ATO and APRA), Treasury, Educational Institutions and Peak Body Groups. His knowledge, experience, problem solving ability and dedication to his clients sets him apart from other practitioners in this area.

**Kim Christy, CTA**, is a Tax Partner with EY in Queensland and has experience in Australian income tax matters across the financial services industry and beyond. Her expertise covers a broad spectrum of income tax issues affecting the wealth and asset management industry including supporting some of Australia's largest superannuation funds. She has experience on a variety of matters including outbound investment tax issues, tax risk management, mergers and successor fund transfers, trustee tax issues and managing tax compliance matters including ATO reviews and disputes.

# Presenters

**Peter Crump, CTA**, is a Senior Consultant, Private Wealth at BDO Adelaide. Peter has specialised in the provision of advice on superannuation issues, especially with SMSFs, and brings a blend of experience as an actuary, financial adviser and consultant, with 40 years industry experience. He provides strategic advice to SMSFs, which is part of the overall lifestyle financial planning for their members. Peter also provides expert advice to Family Lawyers on superannuation related issues. Peter is a previous Chairman and board member of the SMSF Association.

**Craig Day** is the Head of Technical Services for Colonial First State and has over 25 years experience in the financial services industry. In his role, Craig is responsible for providing specialist technical support to financial advisers. Craig holds a Masters of Taxation (financial planning) and is a Fellow Member of the SMSF Association.

**Nidal Danoun** is the executive director of Prosperity Financial Services (PFS Consultancy). Nidal provides advice and training to organisations, businesses, and professionals in the areas of financial services regulations, ethics, corporate governance, and culture.

Nidal is also a lecturer at the University of New South Wales (UNSW) Business School and the Australian Graduate School of Management (AGSM) in the areas of wealth management, ethics, leadership and estate planning. He is also a Certified Ethics Trainer with the CFA institute. Nidal regularly work with and advise regulators, financial and education institutions and accounting firms. Nidal holds a Master of Commerce in finance and business law; he is a Chartered Accountant, a Fellow CPA Financial Planning Specialist, a Certified Financial Planner, Chartered Tax Adviser, and a member and a certified ethics trainer of the CFA Institute. Nidal has over 25 years of experience in the financial services industry.

**Paul Delahunty** has over 24 years of experience working in government regulatory roles and is the Director of the SMSF Approved Auditors area of the ATO. In this role he has responsibility for engaging with industry partners and leading the ATO's compliance program for SMSF Auditors. Paul has a strong connection with professional associations and chairs the SMSF Auditors Professional Association Stakeholder Group where the Tax Institute is a group member. Paul is also a member of CPA Australia's disciplinary tribunal.

**Marco Feltrin** is a Partner and leads the national superannuation tax practice for PwC. He has over 20 years experience and specialises in providing tax services to large superannuation funds and the funds management industry. Marco has advised many clients on numerous tax matters including domestic and cross border investments, tax authority reviews and disputes, and tax governance matters. Marco frequently presents to Boards and Audit Committees of large superannuation funds and is heavily involved with government in relation to tax reforms impacting the industry.

**Bryce Figot, CTA**, is recognised as one of Australia's leading SMSF lawyers. He has worked predominantly in the fields of tax and superannuation over the past 18 years and holds a Master of Laws from the University of Melbourne. Bryce is a regular seminar presenter on tax and SMSF topics and has published extensively in these areas. Bryce regularly presents for the major professional bodies including the SMSF Association, CPA Australia, The Tax Institute, Chartered Accountants Australia and New Zealand and DBA Network.

**Bernard Finnegan, CTA**, is a director in the KPMG Tax & Legal division. He has over 40 years of tax technical

experience at KPMG and the ATO and is a Chartered Tax Adviser and a Certified Practising Accountant. For over 25 years he has specialised in the financial services sector and is a leader in KPMG's national superannuation funds tax practice. Bernard has extensive knowledge and practical experience in providing tax services to a wide range of wealth management organisations, including superannuation entities, life companies, managed funds, wrap platforms, and investment managers. He has authored and presented on a number of superannuation fund tax thought leadership matters.

**Daniel Fletcher** is a partner within EY's International Tax and Transaction Services, located in San Francisco, California. He has more than 17 years of tax advisory experience, specializing in cross-border transactions. Daniel has extensive experience working in the area of private capital investments on a wide variety of cross-border transactional matters including leveraged buyouts, direct lending, debt workouts, and investment fund structuring. Daniel holds B.B.A. and M.P.Acc. (Taxation) degrees from the University of Washington, Foster School of Business. He is a Certified Public Accountant licensed in both the State of California and the State of Washington.

# Presenters

**Andrew Grace** is a director in the Public Groups (PG) business line of the ATO. Andrew leads the Superannuation Risk and Strategy team which focuses primarily on the income tax obligations of APRA regulated superannuation funds. Andrew joined in the ATO in 2003 and has worked with the superannuation industry in different roles since 2007 in PG and works closely with business lines across the ATO that support the superannuation industry with issues ranging from income tax on contributions and investments, law design and member reporting issues.

**Brad Ivens, ATI**, is an Associate Partner in EY's Financial Services tax practice, focussing on wealth and asset management including superannuation funds and managed funds. In particular, Brad has over 20 years' experience in providing tax compliance and advisory services for the superannuation industry, covering matters such as investment due diligence, capital gains tax planning, unit pricing/crediting rate reviews, custodian tax reporting, fund administration, tax effect accounting, tax governance and ATO reviews/audits. His clients have ranged from some of Australia's largest industry and retail funds, through to public sector and

employer-sponsored funds. Brad has also been an active contributor to the government and the ATO in relation to various superannuation tax issues and reforms.

**David Kasmarik** is an Assistant Commissioner in Public Groups (PG) at the ATO. As part of his role, David has responsibility for the Superannuation Risk and Strategy and is also responsible for PG Engagement and Assurance teams in Parramatta managing a range of taxpayer engagement activities including tax assurance reviews of Top 100 and Top 1000 taxpayers. David has previously held a number of roles across the ATO including as program lead of the former International Structuring and Profit Shifting strategy and roles involving Property & Construction and Banking and Finance.

**Aparna Koneru** is a principal in EY's International Tax and Transaction Services practice based in Houston, Texas. Aparna has significant experience in advising private equity funds, infrastructure funds, and US domestic and international energy companies in connection with tax issues associated with energy transition, upstream, midstream, downstream and renewable energy transactions. Aparna is a frequent speaker on the US Inflation

Reduction Act including qualification and monetization of US energy tax credits. Prior to EY, Aparna was a Tax Lead at Shell USA, Inc. focusing on energy transactions. Aparna is an attorney by background and received her JD degree from the University of Texas School of Law and LLM degree in taxation from New York University School of Law.

**Darius Lalkaka, CTA**, is the General Manager, Taxation at HESTA an Industry Superannuation Fund managing approx. \$85 billion of assets for members in the Health and Community Sector. Darius has over 18 years' experience in the financial services sector, with most of this experience being within the superannuation industry. His experience spans across tax governance, risk management, investment due diligence, Trustee tax, custodian/administrator tax reporting, member tax and administration matters. At HESTA, Darius has designed and internalised the tax function and today leads a high performing tax team.

**Neil Lamb, ATI**, is a partner in KPMG's Asset and Wealth Management Practice. He has over 20 years experience advising both domestic and multinational corporations, fund managers and private equity on structuring their investments

into Australia and offshore. He specialises in the tax aspects of financing transactions, corporate restructures, cross border structuring and M&A, and has advised across a broad range of industries and asset classes.

**James Mabbott** is the Partner in Charge for KPMG Futures. James uses his strong leadership capability to work at CEO and Board levels on the strategy and marshalling of limited resources to drive profitable business growth with the aim of creating maximum value for key stakeholders. James played a key role with industry participants, government and industry associations to co-author the landmark piece of thought leadership into financial services technology startups: 'Unlocking the potential: The Fintech opportunity for Sydney' and has actively worked to establish Sydney's first industry-led Fintech hub – Stone & Chalk. James has also helped enterprise B2B startups scale and grow their businesses globally. He has co-designed a number of industry accelerator programs designed to build next generation products and services. An active member of his community, James is creative and innovative, has strong communication skills and is passionate about people and helping disadvantaged communities.

# Presenters

**Philip Marquet** regularly advises the investment teams of some of Australia's largest superannuation funds on significant investment transactions across a range of wide range of asset classes, including infrastructure, private equity, debt and property. This includes advising on the implementation and disclosure of ESG investment strategies. Philip's practice also includes advising institutional investors and investment managers on a range of governance, regulatory and transactional matters. Philip also assists major Australian superannuation funds and investment managers to meet their compliance obligations under Australia's anti-money laundering and counter-terrorism financing laws.

**Jo Masters** is the Chief Economist of Barrenjoey Capital Partners, a proudly Australian financial services firm. She focuses on trends across the economy and financial markets and has been a highly regarded part of the economic debate in Australia for 25 years. Jo is passionate about the role of economics in shaping the world we live in and aims to provide insights that help clients succeed. Her views are regularly sought by Australian and international media. Her

career started in banking and financial markets, with 14 years at Macquarie Bank in various roles in economics and foreign exchange, before moving to ANZ. Most recently, Jo was the Chief Economist for EY Oceania. She an Executive Member of the Australian Business Economists and a mentor for the Minerva Foundation.

**Landon McGrew** is a principal in EY's National Tax Department based in Washington DC and leads the EY Americas Infrastructure Tax practice. Prior to joining EY, Landon led the Infrastructure M&A Tax practice and US-Australia Corridor at another Big Four firm. Landon has almost 20 years of experience advising fund managers, pensions, sovereigns, and corporates on acquisitions, dispositions, and refinancings across a wide range of infrastructure sectors (including communications, energy transition, power and renewable energy, transport and logistics, and social infrastructure) and other asset classes such as private equity, real estate and credit funds. Landon began his career as a tax attorney in the Washington DC office of McKee Nelson LLP.

**Daniel Mobrıcı** joined AustralianSuper in 2018 and currently leads the

Investments Tax team in Australia. AustralianSuper is Australia's largest superannuation fund with a purpose to help its members achieve their best financial position in retirement. AustralianSuper is a global investor across multiple asset classes including infrastructure, property, private credit and private equity. Prior to joining AustralianSuper, Daniel worked in the Deloitte International Tax team for over 8 years advising on a wide range of investments and cross border matters.

**Jemma Sanderson, CTA**, is a Director of Cooper Partners Financial Services, heading up their SMSF specialist services. Jemma provides strategic advice on SMSFs, estate planning and wealth management to clients, as well as technical support and consultancy accounting, legal and financial planning groups. Jemma has over 20 years' experience in developing complex strategies for high-net-worth clients. Jemma is a regular presenter on superannuation and SMSFs for the professional bodies across the country, and is the author of The Tax Institute's popular publication for SMSF Advisers, the SMSF Guide, in its ninth edition. Jemma was named the

SMSF Adviser of the Year at the 2019 National Women in Finance awards for the third year in a row and received the SMSF Association Chairman's Award in February 2018 for her contribution to the industry.

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

**Kara Singleton, ATI**, is a Partner in Deloitte's Trust & Governance Team with over 20 years experience advising the wealth management industry on tax risk management, investments, and all aspects of compliance. Kara is passionate about tax governance and working with clients to ensure appropriate and robust processes are in place to manage their key tax risks – including their reliance on third-party tax data.

# Presenters

**Ruth Stringer** has over 30 years of experience and leads MinterEllison's superannuation practice. Ruth is ranked Band 1 in Superannuation by Chambers Asia-Pacific and is consistently recognised in the Superannuation category of Best Lawyers. Ruth advises superannuation trustees, employers and fund managers on all aspects of the regulatory ecosystem in which super funds operate. She has had a diverse career which has included working as in-house counsel and working with ASIC, enabling her to offer clients a perspective on the policy context to the law as well as some understanding of its practical impacts.

**Dr Geoff Warren** is Research Fellow at the Conexus Institute and Honorary Associate Professor with the Australian National University. He is a member of various investment and research advisory boards including: ASIC Consultative Panel, Atlas Infrastructure, ANU Student Managed Fund, Brandes Center, the Salvation Army and Super Consumers Australia. Geoff's research has an applied and policy emphasis with particular focus on superannuation, retirement and fund management. He has spent over 20 years as an investment practitioner spanning stock research, investment strategy, head of research, equity portfolio management and asset consulting.

**Liz Westover, FTI**, is a Partner and the National SMSF Leader at Deloitte. She is responsible for the firm's SMSF service offering providing compliance and advisory services to the firm's clients. Liz has extensive experience in superannuation and has strong capabilities on the technical application of superannuation and associated tax laws. She is a regular commentator on superannuation issues with mainstream and social media and has authored blogs and articles on superannuation and related issues for many years. Liz has been heavily involved in superannuation policy development and advocacy, regularly liaising and consulting with Government, regulators and stakeholders on technical, legislative and policy matters. She is a Fellow of The Tax Institute, Fellow Chartered Accountant, CA SMSF specialist and holds a Master of Legal Studies from the University of New South Wales and a Bachelor of Business from the University of South Australia.

**Victoria Yessayan, CTA**, is a Director in the GST Advisory team at KPMG. Victoria has over 16 years' experience in advising on the technical and commercial implications of Australian GST. With a focus in financial services, Victoria assists a range of clients in the

asset and wealth management, banking, property and insurance sectors across a full range of GST technical matters. Victoria's experience includes GST system and process reviews, managing

ATO's Combined Assurance Reviews and Specific Risk Reviews, navigating specific industry risks, GST data testing and advising on structuring/merger transactions.



# Venue and accommodation



## Crown Sydney

1 Barangaroo Ave, Barangaroo NSW 2000

Crown Sydney offers uncompromising design that captures the essence of its harbour side setting, highly intuitive personalised service, and the finest dining and facilities unlike anything Sydney has seen before. Located in the bustling precinct of Barangaroo, connected to sprawling parklands, laneway bars, beautiful public artworks and bay views of Sydney redefining bespoke luxury in the heart of the harbour.

### Getting there

Crown Sydney is centrally located along the Barangaroo waterfront, yet still close to the heart of Sydney. Sydney Airport is located just 15 kilometres from the hotel. The closest train station is the Wynyard stop, a 9-minute walk to Crown Sydney. The closest light rail stop is the Bridge Street stop, where the L2 and L3 run. This stop is an 11-minute walk to Crown Sydney. The closest stop is Barangaroo South on Hickson Rd, which is a 3-minute walk to Crown Sydney.

### Parking

Valet Parking is available through the hotel's Bell Desk team at the rate of \$80.00 per 24 hours. Alternatively, The Barangaroo Reserve car park is a 10-minute walk to Crown Sydney. We invite you to visit the website to view the most current rates and book in advance <https://www.carepark.com.au/find-a-care-park/barangaroo-reserve>. The closest Wilsons public car park is located at Barangaroo Reserve, however, please kindly be aware this parking lot does not operate 24 hours. For more information you can also visit <https://www.crownsydney.com.au/general/getting-here>.

### Accommodation

Favourable room rates have been negotiated and secured at Crown Sydney. Accommodation bookings can be made by following the link on the event web page or by clicking [here](#). *This offer is not combinable with other offers and non-commissionable.*

Please refer to the hotel refund policies when booking your accommodation. 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.

## Networking function

A networking function will be held directly following the last session on Thursday from 5.30pm at Crown Sydney. 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.

## 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](mailto:nationalevents@taxinstitute.com.au).

## 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](mailto:nationalevents@taxinstitute.com.au).

For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au).



# Registration

## Registration inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ conference lunches	Conference networking reception and closing drinks*
<b>Full registration</b> This registration option entitles one delegate to attend the entire event.	✓✓✓	✓✓✓	✓✓✓

\*Additional tickets to the networking functions can be purchased on the registration form.

## Discounts

### Early bird registration

All registrations received and paid on or before Friday 4 October 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.

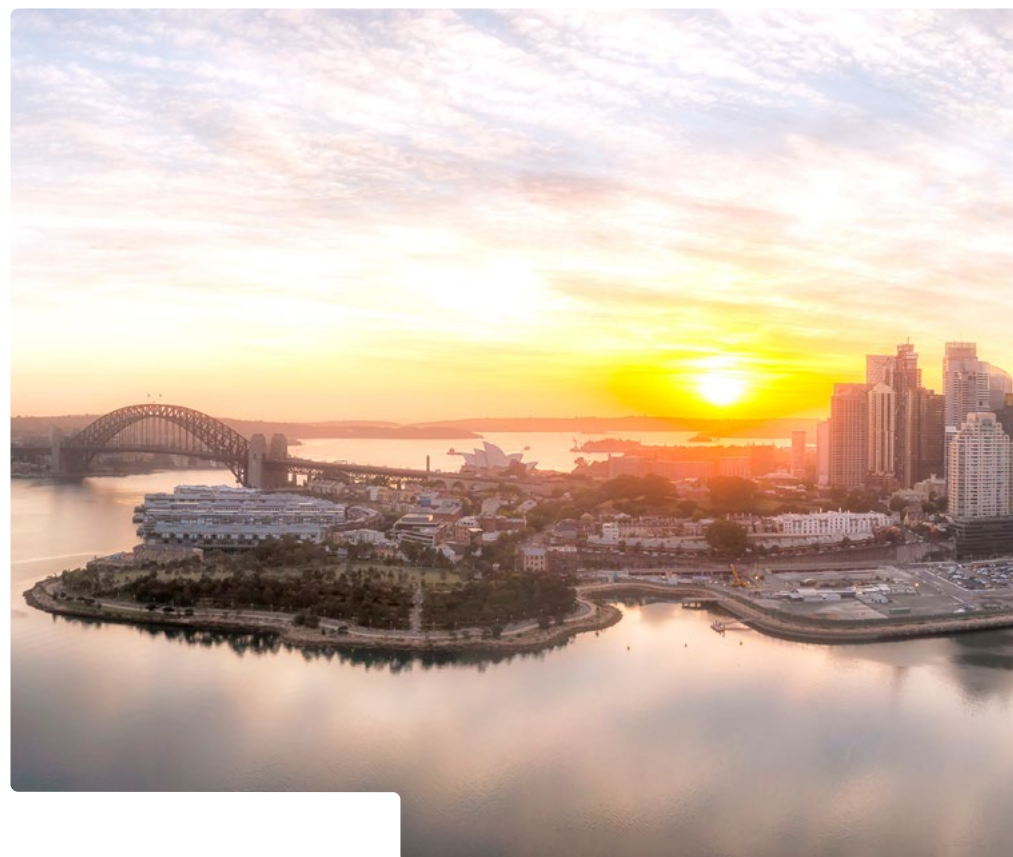
This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

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 17 for registration inclusions.

#### Full registration – 12 CPD hours

	Member	New member*	Non-member
<b>Early bird registration</b> Register on or before 4 October 2024	<input type="checkbox"/> \$1,800	<input type="checkbox"/> \$2,190	<input type="checkbox"/> \$2,100
<b>Standard registration</b> Register after 4 October 2024	<input type="checkbox"/> \$2,000	<input type="checkbox"/> \$2,390	<input type="checkbox"/> \$2,300

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, 31 October 2024: Crown Sydney.

- 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 function at \$80 per person

No.  x tickets at \$80 each: \$

Dietary requirements:

#### \*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 \$220 on Affiliate membership for 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](http://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**

### 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

### 3 Breakout session options

Please tick the breakout sessions you would like to attend during the conference:

#### Thursday, 31 October 2024

- 11:00am–12:00pm  Session 2A  Session 2B
- 12:00–1:00pm  Session 3A  Session 3B
- 2:00–3:00pm  Session 4A  Session 4B
- 3:00–4:00pm  Session 5A  Session 5B

#### Friday, 1 November 2024

- 10:30–11:30am  Session 9A  Session 9B
- 11:30am–12:30pm  Session 10A  Session 10B
- 1:30–2:00pm  Session 11A  Session 11B
- 2:00–3:00pm  Session 12A  Session 12B

## 4 Payment summary

Registration fees \$

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

**Total payable** \$

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

## 5 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](http://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](mailto:nationalevents@taxinstitute.com.au)

For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

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**To register**

Email [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

Mail Level 21, 60 Margaret Street, Sydney NSW 2000

Online [taxinstitute.com.au](http://taxinstitute.com.au)

Join the conversation

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

