The Tax Institute

Noosa Tax Convention

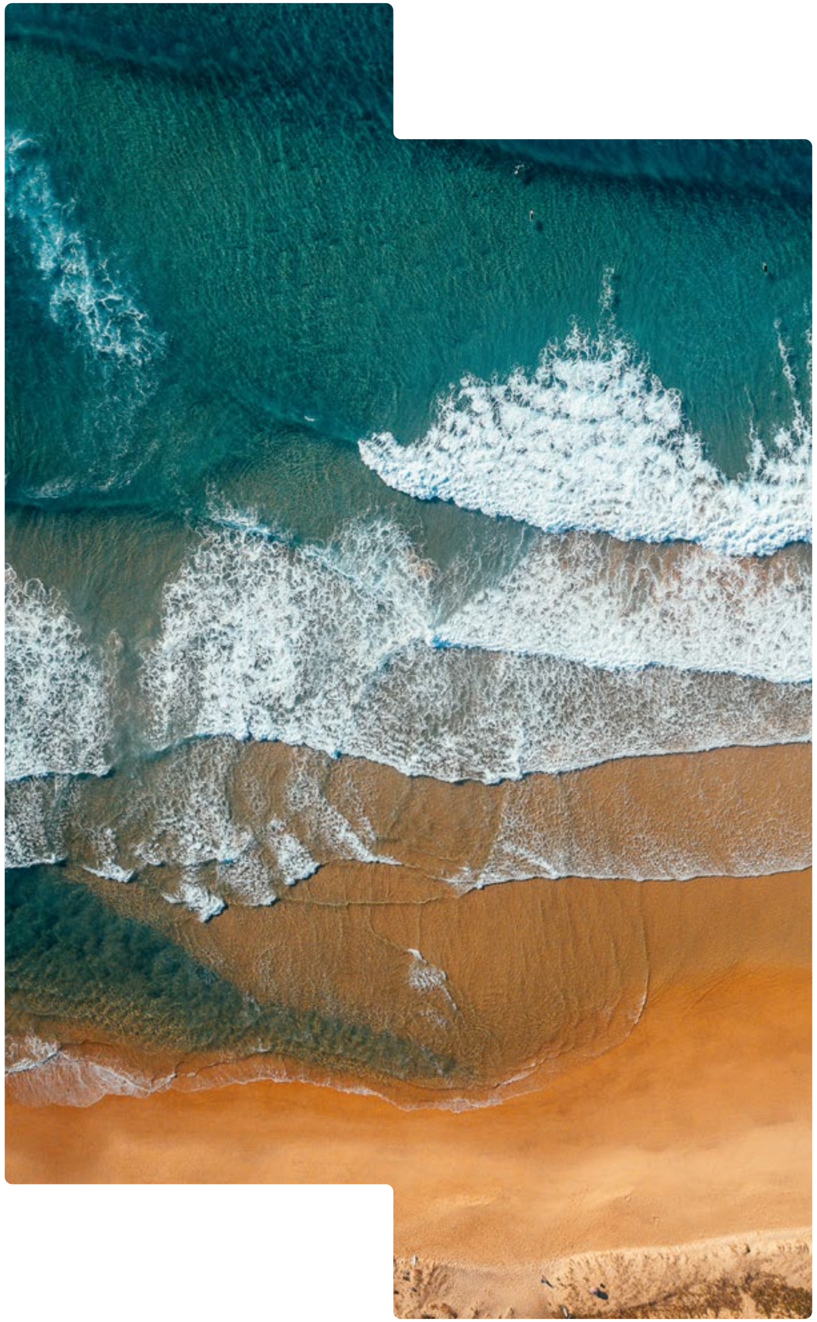
13–15 November 2024

Sofitel Noosa Pacific Resort

13 CPD hours

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

Kim Reynolds, CTA, Co-Chair, Noosa Tax Convention Organising Committee
Emma Woolley, Co-Chair, Noosa Tax Convention Organising Committee
Liz Allen, Macpherson Kelley
Anthony Bach, CTA, Australian Taxation Office
Leo Efthivoulou, CTA, ENA Law
Michelle Hartman, CTA
Kaitilin Lowdon, ATI, Sladen Legal
John Middleton, CTA, Australian Taxation Office
Rachel Vijayaraj, CTA, Brown Wright Stein Lawyers
Mariana von Lucken, CTA, HLB Mann Judd



Welcome

Greetings and a warm welcome to the Noosa Tax Convention.

It is critical, now more than ever, with an aging population and increasingly complex business structures that advisors have a holistic understanding of restructuring, trusts and succession planning.

This year, we will begin with a debate where four experts will argue their case for and against the use of trusts in Australia 2024 and beyond. Next, we will dive into the intricacies of succession planning from the outset and throughout.

As usual the program has been designed to provide both plenary presentations given by high quality presenters and the opportunity to apply the key issues in interactive practical workshops. We are delighted that so many in demand, quality presenters have made themselves available to present for our 2024 Convention. Will will hear from Mark Macrae on the lastest in Part IVA disputes and Suzanne Mackenzie, who joins us from South Australia, on everything you need to know about the big business that is Superannuation.

We have also consolidated our usual social activities program to allow more time for delegates to come together connect, network and relax.

Back by very popular demand is our ATO Hot Topics session, where we are lucky enough again to be joined by Louise Clarke who will navigate the ATO's key focus areas and technical issues covered in the program and take questions from the audience.

As always, this event is popular and sells out every year, so we encourage you to please register early to guarantee your spot. We look forward to welcoming you in Noosa.

Kim Reynolds, CTA
Co-Chair, Convention Organising Committee

Emma Woolley, CTA
Co-Chair, Convention Organising Committee

Early bird offer
Register on or before Friday, 18 October 2024 to save!

Technical program

Day 1 Wednesday, 13 November 2024

Time	Session
2:00 – 2:30pm	**Registration**
2:30 – 4:00pm	**Opening Keynote Debate: The use of trusts in contemporary Australia** Speakers: Leanne Connor, CTA, WCG Business Advisors, John Ioannou, CTA, Macpherson Kelley, Sally Preston, CTA, Smart Solutions Tax & Business Advisory, Mark Robertson KC, CTA, QLD Bar Facilitator: Jacquii Burnham, CTA, KPMG Join us for an engaging and thought-provoking debate to open the Noosa Tax Convention. Our debaters will explore the intricacies of trusts with expert speakers presenting compelling arguments for and against their use in 2024 and beyond. Discover how trusts remain a powerful tool for wealth and succession management, offering tax flexibility and asset protection. Contrast this with the challenges and concerns surrounding trusts, including the complexities of governance, their lack of transparency, and continued scrutiny from regulators. This debate promises to provide entertaining and valuable insights and foster a deeper understanding of one of the most sig-nificant issues for professional advisers. Don't miss the chance to be part of this crucial conversation and decide who comes out on top!
4:00 – 5:00pm	**Delegate free time**

Technical program

Day 2 Thursday, 14 November 2024

Time	Session
7:45 – 8:15am	**Registration**
8:15 – 8:30am	**Welcome and President's address**
8:30 – 9:30am	**Session 1: Succession planning part 1 – Navigating a smooth business succession plan** **Speaker: Linda Tapiolas, CTA, Cooper Grace Ward** As businesses evolve, planning for the next phase — whether that's transitioning to the next generation, selling, or winding down — is crucial. This session will discuss some of the complexities to be navigated as part of a well-planned exit including: • When should exit planning begin? • How to achieve certainty, simplicity and flexibility • Is pre-sale restructuring necessary or possible? • Dealing with historical transactions; and • Tricks and traps of a planned exit.
9:30 – 10:30am	**Session 2: Succession planning part 2 – What happens when the planned exit doesn't go to plan** **Speaker: Andy Milidoni, CTA, Johnson Winter Slattery** Often a business exit doesn't progress as planned and is rarely without challenges (regardless of the size of the transaction) This session will cover some of the potential deal breakers: • Tips and traps with the tax due diligence process, including common tax issues and how to manage them • Tax warranties and indemnities – what to expect and what to look out for; and • Changes to the deal structure as a result of due diligence findings, and the potential tax impact. And, if the deal falls over and the current owners cannot/will not continue together: • Does the business simply cease trading? • Or something else?
10:30 – 11:00am	**Morning tea**

Technical program

Day 2 Thursday, 14 November 2024 continued

Time	Session
11:00am – 12:00pm	**Session 3: Ethics and integrity** **Speaker: Peter de Cure AM, Tax Practitioners Board** In the past couple of years there has been a renewed focus on ethics and integrity in the tax profession. This session will focus on recent changes to the Tax Agent Services Act (TASA) including: • Enhancements to the Code of Professional Conduct • What the recent changes mean for individuals and businesses providing tax agent services; and • How will the TPB administer the changes.
12:00 – 1:00pm	**Session 4: Tax Governance Panel** **Panel: Belinda Cheesewright, CTA, KPMG, Glenn Cooper, Australian Taxation Office** **Facilitator: Elizabeth Allen, Macpherson Kelley** This session will discuss: • ATO expectation on governance when transferring to the next generation • Tie in from all the sessions – war stories; and • Highlight key areas from governance piece.
1:00 – 2:00pm	**Lunch**
2:00 – 3:30pm	**Workshop 1: Trusts and succession planning** **Workshop Coordinator: Peter Bardos, HLB Mann Judd** **Workshop Leaders: Peter Cohilj, Kelly Partners, John Elliott, CTA, Strategic Edge Business Services, Peter Glindemann, Australian Taxation Office, Michelle Hartman, CTA, Morag Ingham, CTA, Findex, Nicholas McCann, WRP Legal & Advisory, Mark Molesworth, CTA, BDO, Sally Preston, CTA, Smart Solutions Tax and Business Advisory** This session will cover some of the key concepts in the opening debate and plenary sessions 1 and 2.

Technical program

Day 2 Thursday, 14 November 2024 continued

Time	Session
3:30 – 4:00pm	**Afternoon tea**
4:00 – 5:00pm	**Session 5: Navigating the whole new world of Part IVA disputes involving trusts** Speaker: Mark Macrae, CTA, EY The past year has seen a host of significant decisions on the application of general and specific anti-avoidance regimes to trusts and trust distributions. The Commissioner appears eager to test the limits of these regimes, particularly in relation to transactions that were once considered low risk. This session will: • Present an overview of important cases, including *Minerva*, *Guardian*, *Ierna*, *Merchant*, *MJH Trading Trust*, and *Collie & Grant* • Analyse the evidentiary burden in relation to the identification of tax benefits and dominant purpose; and • Provide practical tips on how to prepare for and manage disputes where the ATO seeks to apply an anti-avoidance regime.
5:00 – 7:00pm	**Delegate free time**
7:00pm	**Networking function**

Networking function

This year, we are excited to offer the networking dinner as a cocktail event featuring an array of canapes and substantial food options, offering the perfect opportunity to connect and unwind in a relaxed atmosphere.

Date: Thursday, 14 November 2024

Time: 7.00pm onwards

Venue: Sofitel Noosa Pacific Resort

Price: Inclusive for all full registration delegates
Additional tickets are $150 per person, see registration form for details

Dress: Business/Business Casual

Technical program

Day 3 Friday, 15 November 2024

Time	Session
8:30 – 9:00am	**Tax policy & advocacy update** Speaker: Robyn Jacobson, CTA, The Tax Institute
9:00 – 10:00am	**Session 6: Estate planning – The weird and wonderful** Speaker: William Moore, Hall & Wilcox This session will explore: • Some of the weird and wonderful assets that people have as a part of their estate • Global issues not fitting into Australian tax net • Administration of estates and how and why so many people get it wrong • How getting it wrong makes it hard; and • Bank of Mum and Dad, family law and equalisation.
10:00 – 11:00am	**Session 7: Superannuation** Speaker: Suzanne Mackenzie, CTA, Bar Chambers Given recent investment returns and further contributions, the Treasury estimate that by July 2025 there will be around 80,000 individuals with more than $3 million in superannuation. This, coupled with typically conservative drawdowns on superannuation, means it is inevitable that many superannuants will die with significant wealth still held in the superannuation system. At the Commonwealth level there is an interest in policy measures designed to disincentivise superannuation being used for intergenerational wealth transfer. So far, however, there has been no attempt to introduce any penal death taxes akin to those that exist in other jurisdictions, and superannuation still remains an attractive estate planning tool. This session will address: • The impact of the proposed new Division 296 tax (if any) on succession planning for superannuation; • Tax-free pre-death withdrawals from superannuation and the Commissioner's views; • Common errors in succession planning for superannuation; • Planning for capacity concerns for binding nominations, deathbed decision-making and unexpected dependants!
11:00 – 11:30am	**Morning tea**
11:30am – 1:00pm	**Workshop 2: Estate planning and superannuation** Workshop Coordinator: Laura Hanrahan, Hall & Wilcox Workshop Leaders: Leo Efthivoulou, CTA, ENA Law, Linda Farmer, CTA, TaxLF, Peter Godber, CTA (Life), Godber Advisory, Christopher Jenkins, ACCOUNT.ABLE Advisory, Megan Kelly, BusinessDEPOT, Archana Manapakkam, ATI, Velocity Legal, Matthew McKee, FTI, Brown Wright Stein, Rachel Vijayaraj, CTA, Brown Wright Stein Lawyers This session will cover some of the key concepts in the plenary sessions 5, 6 & 7.

Technical program

Day 3 Friday, 15 November 2024 continued

Time	Session
1:00 – 2:00pm	**Lunch**
2:00 – 3:00pm	**Session 8: ATO hot topics** **Speaker: Louise Clarke, Australian Taxation Office** Deputy Commissioner Louise Clarke returns to Noosa with another engaging session on the priority issues for the ATO in the private groups market. Louise will be covering some of the major developments in this space over the last year including: • The release of public advice and guidance on the application of section 99B • Topical litigation in the Federal Court regarding Division 7A, section 100A and Part IVA; and • The Tax Avoidance Taskforce and its continued focus on private groups. Like last year, this will be an interactive session with Louise taking questions from the audience throughout her presentation.
3:00pm	**Closing drinks and networking**

Presenters

Elizabeth Allen is a Special Counsel at Macpherson Kelly. She acts for a wide range of private, corporate and HNWI clients with a primary focus on tax structuring and tax dispute work, concentrating on the delivery of outcomes and solutions that give her clients the confidence to keep doing what they do best. Elizabeth also acts for clients on various commercial matters including business sales and acquisitions.

Peter Bardos, CTA, is a partner at HLB Mann Judd. He is regarded for his ability to advise on complex tax matters, combining his knowledge of the tax legislation with an understanding of commercial and industry specific issues. Peter has experience in many specialist areas, including: funds management, transaction advisory services for sales, acquisitions and restructures, and tax effective investment structures. Peter has experience assisting taxpayers involved disputes with Revenue authorities and obtaining private rulings.

Jacquii Burnham, CTA, is an Associate Director at KMPG in the Enterprise Division. With over 16 years' experience in Public Practice, Jacquii plays a key role as business and personal tax expert to many high net worth individuals and privately owned businesses. Jacquii has a passion for finding solutions to complex tax issues and enjoys working with clients to navigate the best tax outcome for their personal situation.

Louise Clarke commenced her role as Deputy Commissioner, Private Wealth, on 23 August 2021 and her experience makes her well placed to lead the business line. Prior to Private Wealth, Louise was the ATO's Deputy Commissioner for Policy, Analysis and Legislation for just over 3 years. During that time, Louise led the ATO's contribution to the legislative design of the COVID-19 measures, including JobKeeper, and contributed to their implementation. Louise has spent an extensive period of her ATO career working in the Tax Counsel Network: she spent 5 years leading ATO strategic litigation and ran significant cases in the Federal Court and the High Court including Chevron, RCF IV and RCI. Louise's law design experience has spanned across her time in the ATO, including two years seconded to Treasury as a member of the Ralph Review Secretariat, working closely with Treasury in developing redrafted transfer pricing law, leading the ATO's contribution to a number of Board of Tax reviews and working of the design and implementation of a raft of new measures including Division 7A, the alienation of personal services income rules and the debt/equity rules.

Peter Cohilj, FTI, is a Chartered Accountant with over 25 years of experience in providing accounting and tax advisory services. As a Tax Director with Kelly+Partner's Tax Consulting, Peter's depth of knowledge and experience has allowed him to assist with complex commercial disputes through the preparation of expert witness reports and giving evidence in court under cross examination. Peter's areas of specialisation include corporate taxation, trusts, capital gains tax, M&A and employment taxes.

Leanne Connor, CTA, is a Director of WGC Business Advisors, a chartered accountancy firm specialising in taxation and strategic advice to SMEs and high net worth individuals. Leanne has over 30 years experience providing accounting, business advisory, strategic superannuation and taxation services. Leanne's areas of expertise include tax and superannuation planning, business restructuring and understanding the fundamental issues relating to SMSFs, family trusts and private companies. Leanne is a Director and National Council member of The Tax Institute and past chair of its Victorian State Council & PD Committee. She is a regular presenter for The Tax Institute and winner of the 2020 SME Tax Adviser of the Year Award.

Glenn Cooper has extensive experience working closely with the tax profession with the Australian Taxation Office. He commenced his role as Assistant Commissioner, Private Wealth in August 2022, and currently leads the engagement and assurance teams and not for profit compliance teams in Victoria and Tasmania and the Top 500 Tax Performance Program nationally. Glenn was previously an Assistant Commissioner leading the implementation of the Temporary Full Expensing measure for the ATO. He has also previously been the strategy lead for the Next 5,000 Tax Performance Program and had responsibilities for the implementation of the JobKeeper stimulus measure for Private Groups. Glenn has degrees in Commerce/Law, Accounting and Tax.

Peter de Cure AM is the Chair of The Practitioners Board. He is a professional non-executive director. His experience in tax matters has developed over a 25-year career as a tax partner with KPMG, and as a registered tax agent for 16 years. Peter is a Fellow of the Australian Institute of Company Directors and a Fellow of Chartered Accountants Australia and New Zealand. He is Chairman of the Royal Flying Doctor Service SA & NT, Chairman of Wirra Wirra Vineyards, Chairman of Accord Property Holdings Pty Ltd and

Presenters

the Accord Property Development Fund, a Director of PMB Defence Pty Ltd and Presiding Officer of the South Australian Fire & Emergency Commission, a Director of Variety the Children's Charity SA, and advisory board Chairman of Tim Adams Wines.

Leo Efthivoulou, CTA, is a director at ENA Law. Leo has over 14 years experience in advising in various industries, including agriculture and food, property, health and fitness, and to a broad client base. Leo has extensive experience in tax advisory, structuring and restructuring, succession planning, and general commercial legal transactions and advisory. Leo is also a Chartered Accountant, a member of The Tax Institute's various sub-committees including Tax Summit, Noosa and SA Tax Forum.

John Elliott, CTA, has been an accountant for over 20 years. He has extensive experience working with small to medium businesses. John works more recently as a virtual CFO at Strategic Edge Business Services. He advises clients on a broad range of matters such as CGT, structures, business and personal income tax. He has been a Chartered Accountant since 2008, a tax agent since 2010, and more recently in 2017 was admitted as a Fellow Member of The Tax Institute.

Linda Farmer, CTA, is principal at Tax LF Pty Ltd, specialises in assisting family groups build and retain their wealth in tax effective structures that can meet their current and future needs. Working closely with clients to help them understand their key tax risks and designing strategies to help minimise those risks is a key part of Linda's practice. Linda holds a Masters of Taxation from the University of New South Wales and is a Chartered Accountant, Chartered Tax Advisor and a member of the Society of Trust and Estate Practitioners (STEP).

Peter Glindemann is a director at the ATO. His role in the Tax Counsel Network is focussed on resolving complex and strategic tax issues, public advice and guidance and litigation matters for private groups. Prior to joining the ATO, Peter worked for approximately 15 years in various Big 4 tax roles.

Peter Godber, CTA (life) has over 35 years experience in giving professional taxation advice and dealing with change to Australian tax laws. Peter provides advice in many areas of taxation, including business taxation, business and investment structuring, international tax planning, prudential tax audits and tax risk management.

Laura Hanrahan works with families to provide tailored personal and business succession solutions. Her tailored succession planning includes drafting complex wills, testamentary trusts, enduring powers of attorney, discretionary trusts, self managed superannuation trusts, binding death benefit nominations and deeds of family arrangement. Laura also has a particular focus on self managed superannuation funds. Including the establishment of SMSFs and other compliant SMSF investment structures, compliance advice and death benefit planning and payment. Every family is different and Laura enjoys using her creativity to help clients create a succession plan which works for them.

Michelle Hartman, CTA, has many years of experience in providing practical tax advice to clients. Michelle advises private clients across a broad range of issues and taxes, including structuring for acquisitions and divestments. She specialises in assisting private clients (and the families behind them) plan for transition of both ownership and leadership, appreciating that it can be an emotionally challenging time.

Morag Ingham, CTA, is a highly respected tax advisory specialist with over 20 years of experience within professional services across Australia and the UK. She has a committed interest in helping the not-for-profit sector, having both worked in the sector, and served as an advisor to it for most of her professional life. She has extensive experience across a wide range of clients including international businesses, both inbound and outbound, large family groups, and HNW individuals. Her diverse background allows her to draw on professional expertise and my commercial experiences to provide insightful and pragmatic advice to clients, with an eye to making the complex simple.

John Ioannou, CTA, was admitted as a Solicitor in 2002, is a Principal Lawyer at Macpherson Kelley and leads the national tax practice. He has experience in the areas of tax structuring, tax disputes and commercial transactions. John has a Bachelor of Arts, Bachelor of Laws and a Masters of Law.

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She has more than three decades in the profession, including a public practice background that preceded her various training roles over 23 years. A regular conference and webinar presenter, Robyn is also an avid advocate, social media commentator, columnist and blogger, and hosts The Tax Institute's TaxVibe podcast. She is frequently quoted in the media. Robyn is a Chartered Tax Adviser of The Tax Institute, and a Fellow of both CA ANZ and CPA Australia. She regularly

Presenters

consults with the Treasury, ATO and professional associations on technical issues including as Co-Chair of the ATO's Tax Practitioner Stewardship Group and a member of various other working groups. Robyn has been recognised as a Thought Leader five times over four consecutive years (2019–2022) as Winner of this category across the Women In Finance Awards and the Australian Accounting Awards. Robyn was the Winner of the Accountants Daily Excellence Award 2020 and was named in the global Top 50 Women in Accounting 2019.

Megan Kelly helps her clients kick their financial and lifestyle goals. She has a passion for helping the people 'behind a business' and recently won 'SMSF Adviser of the year' in the 2021 Women in Finance Awards. Megan is the go-to trusted adviser for many business owners who just keep coming back, often over many years [during the course of their business life] and into their retirement. Megan regularly provides advice in relation to investment structuring, SIS compliance as well as pension and retirement planning. She has also provided specialist support in relation to estate planning, family law disputes and SMSF compliance issues. Megan is the former Queensland State Chair for the SMSF Association and a valued member of the SMSF specialist network.

Suzanne Mackenzie, CTA is a Barrister specialising in financial services, superannuation, trusts and equity, and taxation law. Suzanne has a great depth of knowledge and experience in superannuation law and takes a keen interest in the latest changes and trends affecting the industry – having done so for more than 30 years. Suzanne regularly appears in the Federal Court and the Supreme Court of South Australia and more recently has acted for the trustees of AustralianSuper, Host-Plus and Equip Super in applications before the Supreme Court of South Australia.

Mark Macrae, CTA, is a legal practitioner director in the Tax Controversy team at EY and advises a range of clients including multinationals, high-net-worth individuals, and large private groups. Mark's practice focuses on managing all stages of complex audits and litigation, as well as advising on federal and state taxes, and the foreign investment regime.

Nicholas McCann, is a Senior Associate at WRP Legal & Advisory. He has a Bachelor of Laws (Honours) and a Bachelor of Commerce (Honours), majoring in Accounting, from the University of Adelaide. Nicholas has extensive experience in taxation advisory as well as tax dispute resolution and lodging submissions with federal and state revenue authorities. Nicholas regularly advises on commercial transactions, in particular taxation planning and structuring, asset acquisitions and disposals, taxation compliance, not-for-profit organisations, restructures and transactional advice. Nicholas works with senior and junior practitioners and other professional advisors to provide advice on a wide range of corporate, commercial and taxation issues (at both federal and state level), to a broad range of clients including private high-net-worth individuals, family groups, large companies (including ASX listed companies) and not-for-profit organisations. Nicholas is also a member of the Law Society of South Australia and the Golden Key International Honour Society (Law and Commerce). In addition to his role at WRP Legal & Advisory, Nicholas tutors Financial Accounting in the Adelaide University Business School.

Matthew McKee, FTI, is a Partner of the Sydney law firm Brown Wright Stein Lawyers. Matthew assists accountants and lawyers in advising their clients on all aspects of tax and superannuation for SMEs and high net wealth individuals and family groups.

Andy Milidoni, CTA, specialises in all aspects of taxation, revenue law and trust law and some aspects of superannuation law. He advises both public and private corporate groups, SMEs and high wealth individuals across industry sectors and in a range of income tax, international tax, GST, duty, payroll tax, land tax and SGC matters, and in both a contentious and non-contentious context. Andy also works closely with a range of intermediaries such as accountants, business and corporate advisers, liquidators, financial planners and court-appointed trustees and guardians.

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.

William Moore leads Hall & Wilcox's national Private Client practice. With over 15 years' of experience, William helps clients to work through their succession planning goals and issues. William is widely regarded as a leading practitioner in the area of succession planning, trusts, estates and estate litigation. William is a

Presenters

ranked individual in Chambers High Net Worth 2024 for Private Wealth Law, a Law Institute of Victoria Accredited Specialist in Wills & Estate Law, a recommended Wills, Estates and Succession Planning Lawyer and Wills & Estates Litigation Lawyer in Victoria in Doyle's Guide to the Australian Legal Profession.

Sally Preston, CTA, is a partner of Smart Solutions Tax and Business Advisory. Sally has an extensive compliance and advisory background, specialising in tax consulting and transaction advisory. With a diverse career background, Sally has worked across various industries and offers a wide range of services to both small and large organisations.These services have included tax advisory, compliance, complex group structures including structuring for listed inbound and privately owned businesses, and assistance with ATO and Revenue office audits.

Mark Robertson KC, CTA, conducts an Australia-wide practice specialising in revenue and trust law. Mark is listed as a leading tax KC by Chambers & Partners Asia Pacific and as 'Preeminent' by Doyle's Guide. He has appeared for commonwealth and state revenue authorities, Australia's leading corporate groups, high net wealth individuals and SMEs, including in estate and family law contexts.

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

Rachel Vijayaraj, CTA, is a Partner at Brown Wright Stein Lawyers with a broad practice advising individuals and SME owners on commercial, tax, trust, estate planning and deceased estate matters. Rachel values forming meaningful relationships with clients and providing advice in collaboration with their accountants on their personal, business and tax affairs. Rachel also heads up the not-for-profits practice, assisting clients establish charitable funds and organisations.

Venue and accommodation

Sofitel Noosa Pacific Resort

14–16 Hastings Street, Noosa Heads, QLD, 4567

The Sofitel Noosa Pacific Resort is in the heart of Noosa, on cosmopolitan Hastings Street, across from Noosa Main Beach and overlooking Laguna Bay and the natural beauty of Noosa River. The Sofitel Noosa Pacific Resort offers the quintessential five-star Noosa experience, from the luxurious AQUA Day Spa through to a full range of leisure activities including golf and tennis. The very spacious, self-contained guest rooms come complete with private balconies and spa baths.

Getting there

The Sofitel Noosa Pacific Resort is approximately a two-hour drive from Brisbane Airport or 40 minutes' drive from Sunshine Coast Airport.

Parking

Car parking is $25 per day for self-parking or $35 per day for valet parking at the Sofitel Noosa Pacific Resort.

Accommodation

Favourable room rates have been negotiated and secured at the Sofitel Noosa Pacific Resort. Accommodation bookings can be made through our accommodation and travel provider, Accommodation Link, by following the link on the event web page

https://www.conferencenational.com.au/noosa-tc-2024

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.

Destination Noosa

Dining Out on Hastings Street

Bistro C | 49 Hastings Street

Positioned perfectly on the beachfront overlooking Noosa's Laguna Bay and inspired by the amazing local produce of the region, Bistro C's menu showcases the changing seasons in carefully created dishes by their dedicated culinary team. Visit the website to find out more or phone 07 5447 2855 to book a table

Locale | 62 Hastings Street

Drawing heavily on Italian tradition, Locale Noosa offers a seasonally changing menu using the best in local produce and premium imported ingredients. Surrounded by lush gardens, Locale Noosa sits in a protected corner of Hastings Street just a few steps from the golden sands of Noosa Main Beach. Visit the website to find out more or phone 07 5447 5111 to book a table.

Bang Bang | 6/32 Hastings Street

Located in the middle of bustling Hastings Street, Bang Bang is one of the best Asian restaurants in Noosa and offers a diverse and extensive wine list as well as a variety of share plates. Visit the website to find out more or phone 07 3185 4666 to book a table.

El Capitano | Upstairs, 52 Hastings Street

Old world pizza's and cocktails for new age sailors. El Capitano is renowned for their take on old world pizzas, made using certified organic fresh milled flours, filtered water, sea salt and a 72 hour fermentation process, pair this with their vast cocktail list and you've got the perfect evening. Visit the website to find out more or phone 07 3185 4666 to book a table.

Explore Noosa

Stand up paddle-boarding

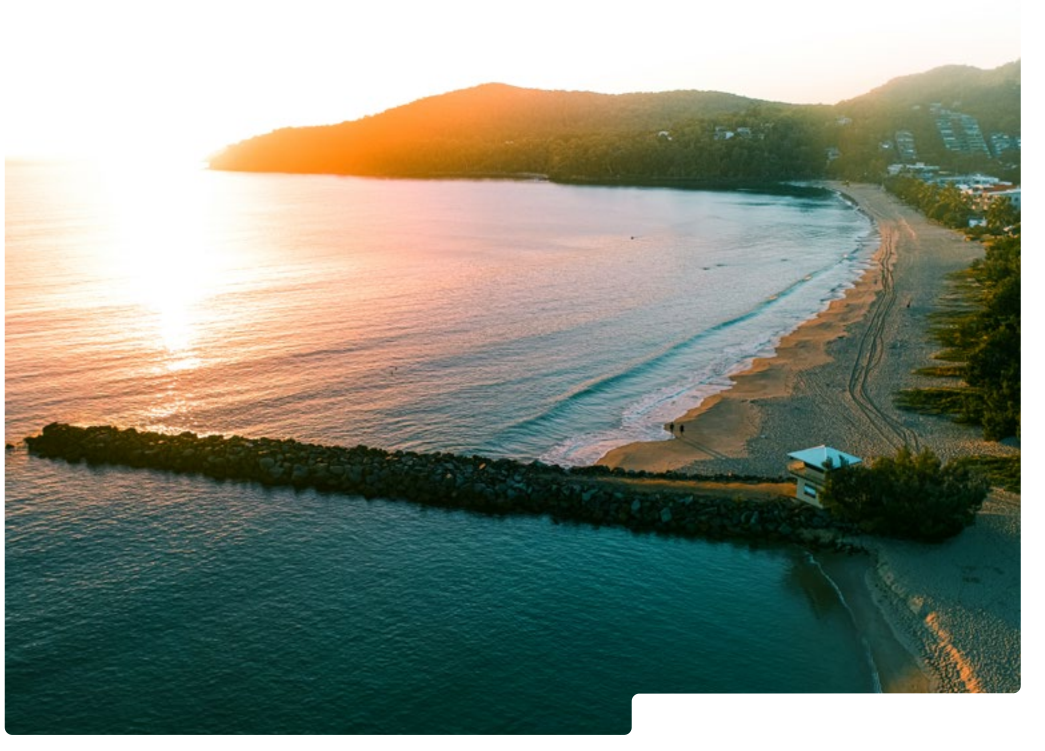
Try your hand at stand-up paddle-boarding and see Noosa from a new perspective, get the team together and book a group lesson or join one of the experienced tour guides for a journey through the waterways and mangroves. Find out more at Noosa Paddle Boarding.

Gondolas of Noosa

If you would rather relax and let someone else do the driving, why not book a Gondola ride? With BYO drink or catered options, you can take your team or enjoy a quiet ride around beautiful Noosa by yourself. Bookings are essential and can be done via their website or by phoning 0412 929 369.

Shopping

Hastings street is a haven for shoppers with an eclectic collection of boutique and brand-name shops covering all things from fashion, fine art, homewares, jewellery and more.



Event information

Networking Function – Thursday, 14 November 2024

The Networking Function will be hosted at the Sofitel Noosa Pacific Resort on Thursday, 14 November from 7:00pm. The networking function is included in the event registration fee for delegates, additional tickets can be purchased for accompanying persons and guests at a cost of $150.

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 Convention 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 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 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 Attendee Hub at any time during the event.

Dress code

Business casual or resort wear attire is suitable for the duration of the Convention.

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.

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee. The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

Privacy

We take your privacy seriously, and our policy can be viewed at: https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer.

Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or nationalevents@taxinstitute.com.au.

For registration enquiries, please contact customeradmin@taxinstitute.com.au.

Registration

Registration inclusions

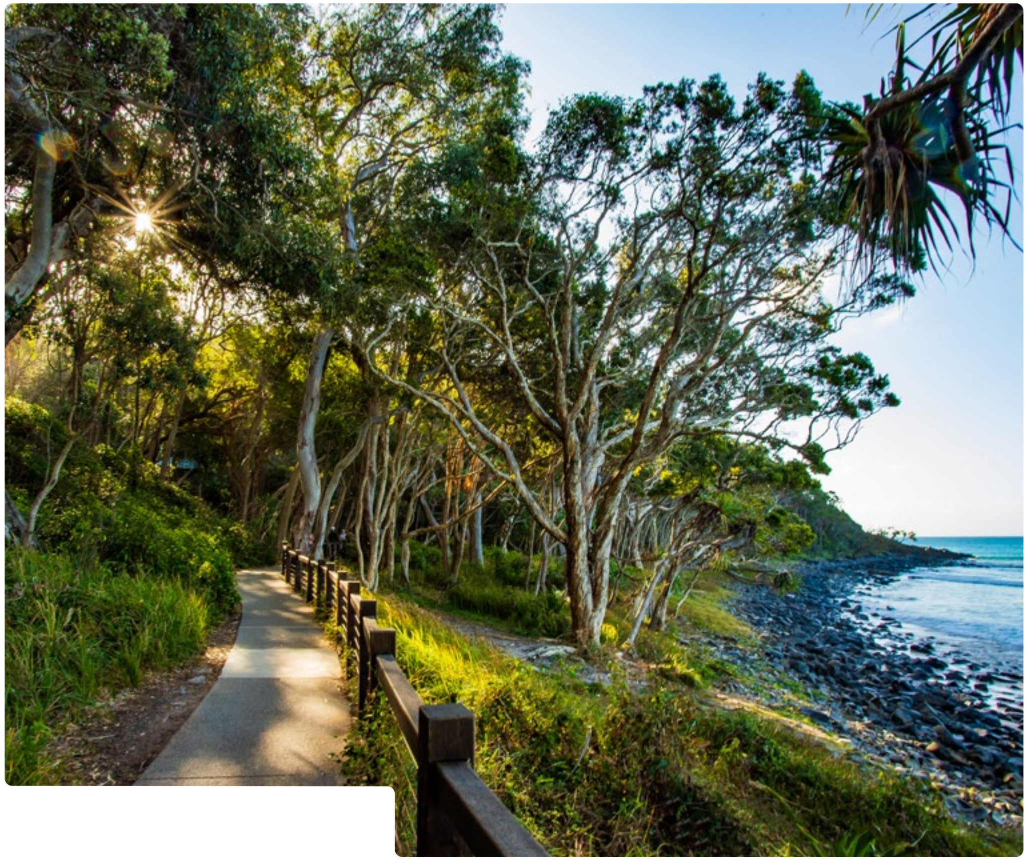
	Online access to presentations and technical papers	Morning/ afternoon tea/ lunches	Networking function*
Face-to-face full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓

*Additional tickets to the Networking Function and Convention Dinner 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 18 October 2024 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

Noosa Tax Convention
Registration form

44126 | WD

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

1 Registration

Please see page 17 for registration inclusions.

Full registration – 13 CPD hours

	Member	New member*
Early bird registration Register on or before 18 October 2024	☐ $2,200	☐ $2,570
Standard registration Register after 18 October 2024	☐ $2,400	☐ $2,770

☐ 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 convention.

Thursday, 14 November 2024 at Sofitel Noosa Pacific

☐ 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 $150 per person

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

Dietary requirements:

2 Delegate contact details

Member no.:

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

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

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

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

JOIN TODAY

*Become a member and save!

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

- save over $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

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

24-035EVT_08/24

3 Payment summary

Registration fees	$
Additional guest tickets – Networking function ($150)	$
Total payable	$

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

4 Payment method

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

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

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

Name on card:

Card no.: Expiry date: MM/YY

Cardholder's signature:

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

For event enquiries, please contact the National Events Team on **1300 829 338** or nationalevents@taxinstitute.com.au

For registration enquiries, please contact customeradmin@taxinstitute.com.au

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

The Tax Institute

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