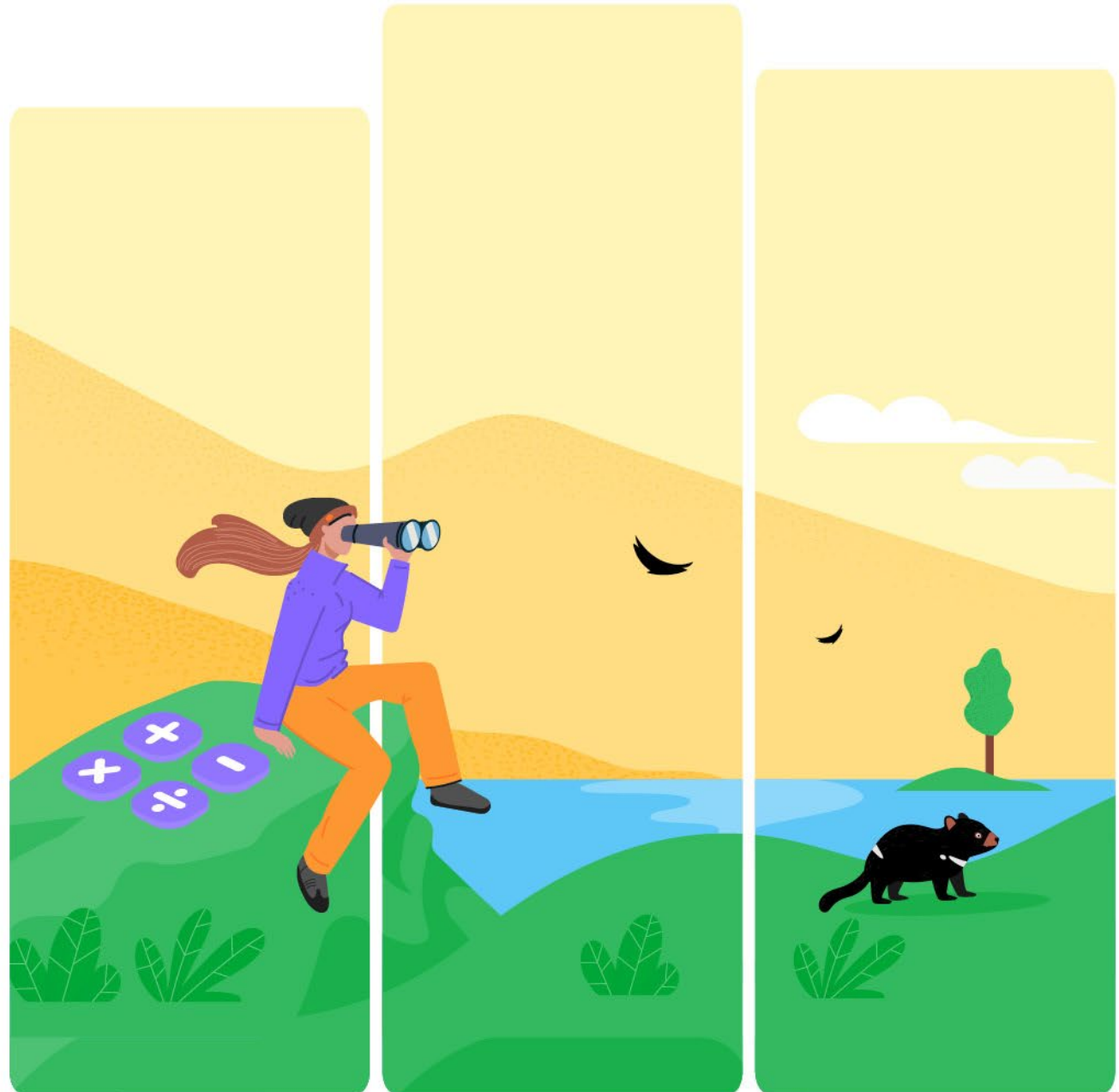


Tasmanian Convention

17–18 October 2024

Hotel Grand Chancellor Hobart

12 CPD hours



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

Svetlana Kolyasnikova, CTA, BDO (Chair, Tasmanian Convention Organising Committee)

Ken Davey, CTA, Consultants for Accountants

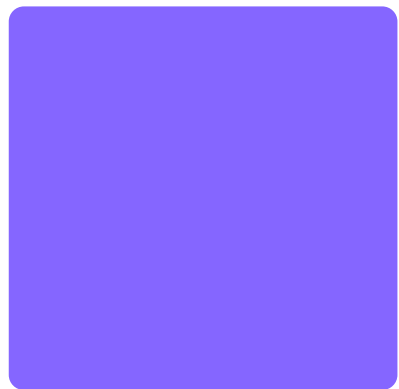
James Hudson, FTI, Deloitte

Robbie Minocha, UTAS

Sam Naragala, CTA, Trendy Tax Solutions

Eveleen Rao, FTI, MERS Enterprises Tasmania

Proudly supported by:



Welcome

Mastering the maze – Navigating the tax minefield with confidence

On behalf of The Tax Institute and the Organising Committee, I am pleased to welcome you to the Tasmanian Convention in Hobart on 17–18 October 2024.

Our theme this year, “Mastering the maze – Navigating the tax minefield with confidence”, aptly captures the intricate and often daunting landscape of taxation.

The complexity of our tax system is a well-recognised challenge in Australia which impacts everyone, making it imperative for us to stay informed and agile. For our practices and clients to succeed, we must adeptly navigate these complexities and adjust to the ongoing changes in our environment. While some changes are beyond our control, we can strategically adopt others to benefit our clients and practices.

In our annual flagship tax event this year we focus on hidden threats in the well-known provisions as well as exploring emerging trends we need to be ready for.

From a workshop on intergenerational wealth transfer and a panel discussion on new tax agent reporting to classical topics of capital management and Division 7A, this year’s Convention addresses the key issues facing the tax profession in 2024 and beyond. The diverse range of sessions is designed to provoke thought and encourage robust discussions during our networking opportunities and the convention dinner, being held this year at the Aura Crowne Plaza.

I extend my gratitude to our presenters, fellow members of the Organising Committee, and the staff of The Tax Institute for their collective effort in bringing this year’s Convention to you. I look forward to seeing you there.



Svetlana Kolyasnikova, CTA, BDO
Chair, Convention Organising Committee

Early bird pricing offer
Register on or before 20 September to save!

Technical program

Day 1 Thursday, 17 October 2024

Time	Session
9:00-9:30am	Workshop registration
9:30am-11:30am	Pre-convention workshop Speaker: Speaker to be announced Session information coming soon . . .
11:30am-12:15pm	Convention registration and lunch
12:15-12:30pm	Welcome and President's address Speaker: Svetlana Kolyasnikova, CTA, BDO, Todd Want, CTA, President, The Tax Institute



Technical program

Day 1 Thursday, 17 October 2024 continued

Time	Session
12:30 – 2:00pm	<p>Session 1: Loans versus Gifts – Parents funding children’s home purchase Speaker: Allan Swan, Estate Planning Equation</p> <p>These days many first home buyers rely on financial assistance from parents or grandparents to get into the real estate market. The choice of loan or gift for the funds can have unfortunate consequences, making forward planning vital.</p> <p>Planning considerations include setting up family law defences, anticipating a child’s possible insolvency, plus eligibility for main residence tax exemptions and overcoming the presumption of advancement. Other tax issues rear their head for investment properties and businesses or where means-tested pension eligibility is important. If funds provided to children are unequal, adjustment and indexation provisions are needed in the Wills of each parent.</p>
2:00 – 3:00pm	<p>Session 2: Practical planning and traps in small business CGT concessions – Tips, tricks, and real-life scenarios Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers</p> <p>This session is designed to provide you with practical tips and tricks for planning your small business CGT concessions. It will address real-life scenarios, focusing on common traps and war stories to help you navigate potential pitfalls. Delegates will gain an understanding of what’s right, what’s wrong, and how to avoid the most frequent mistakes. This session will focus on:</p> <ul style="list-style-type: none">• Is the liability “related” to the CGT asset for \$6m maximum net asset value test• Aggregated turnover: What income is derived from carrying on business and what income can be excluded?• Payment of CGT exempt amounts: Dividend, capital distribution or non-deductible expense; and• Extracting the proceeds of sale from unit trusts and companies tax effectively.
3:00 – 3:30pm	Afternoon tea
3:30 – 4:30pm	<p>Session 3: SMSFs are they still worth it? Speaker: Shirley Schaefer, BDO</p> <p>With ever changing rules around superannuation, is it worth still having a SMSF?</p> <p>This session will explore some of the things that can be done in a SMSF (that you mightn’t be able to do in Industry or Retail superannuation environments) including:</p> <ul style="list-style-type: none">• Contribution Strategies (including re-contribution strategies)• Private Investments (greater return but don’t forget potential increased risk)• Property ownership (what is the best way to do this); and• Benefit and Pension strategies. <p>The session will also cover the latest on the new Div 296 tax (\$3 million threshold tax).</p>

Technical program

Day 1 Thursday, 17 October 2024 continued

Time	Session
4:30 – 5:30pm	<p>Session 4: Small business restructuring and recovery Speaker: Kiara Calvert, Hamilton Calvert Advisory</p> <p>This session will explore the Small Business Restructuring regime (SBR), a practical pathway designed to help small businesses address debt challenges, stay operational, and achieve long-term sustainability.</p> <p>It will cover how financially distressed clients can meet the eligibility criteria to restructure their debt, manage cash flow effectively, and reach legally binding agreements with creditors, including the ATO.</p> <p>SBR offers a simpler, more affordable, and faster solution with fixed costs, making it an ideal option for businesses facing financial difficulties, especially in Tasmania. This session will provide valuable insights into how SBR can support businesses in navigating financial challenges.</p>
5:30 – 6:45pm	Delegate free time
6:45pm	Delegates to make their own way to AURA, Crowne Plaza, Hobart
7:00 – 10:00pm	Convention dinner



Convention dinner

Join your colleagues, peers and our esteemed presenters for an evening of fine dining and networking. Held at AURA Hobart where the ocean meets the mountain, enveloped by sky, located at the Crowne Plaza rooftop on level 12.

Date: Thursday, 17 October 2024

Time: 7:00–10:00pm

Venue: AURA Crowne Plaza Hobart, Level 12, 110 Liverpool Street, Hobart

Price: Included for full registration delegates
\$165 for additional tickets – see registration form for details

Dress: Business casual

Technical program

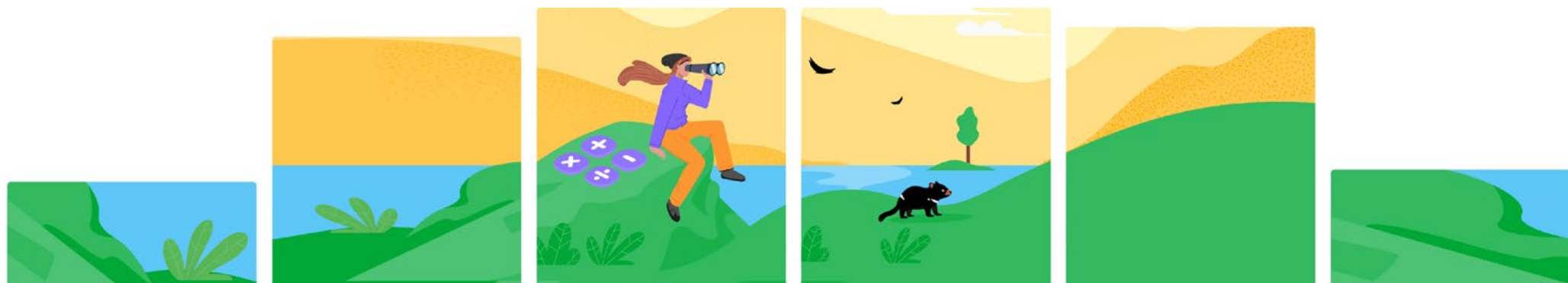
Day 2 Friday, 18 October 2024

Time	Session
8:45 – 9:30am	<p>Session 5: Tax Policy and Advocacy update Speaker: Robyn Jacobson, CTA, The Tax Institute</p> <p>The Tax Institute’s Tax Policy and Advocacy team continues to focus on educating, and advocating with and on behalf of, our members.</p> <p>The session will cover:</p> <ul style="list-style-type: none">• The latest advocacy activities of the TPA team and The Tax Institute’s National Technical committees• Key advocacy matters affecting our members; and• The progress of key announced but unenacted measures (ABUMs).
9:30 – 10:30am	<p>Session 6: State of the State – Economic update Speaker: Cedric Hodges, Deloitte Access Economics</p> <p>This session will provide an economic outlook from a local, national, and global perspective.</p>
10:30 – 11:00am	Morning tea
11:00 – 12:30pm	<p>Session 7: The new breach reporting rules in practice – A panel discussion Panel: Janette Luu, Tax Practitioners Board, Lyndal Kimpton, ATI, Ruddicks</p> <p>Facilitator: Robyn Jacobson, CTA, The Tax Institute</p> <p>On 1 July 2024, the new breach reporting rules commenced, further placing the professional conduct of tax agents and tax practitioners in the political and community spotlight. The new rules form part of a package of recently legislated measures and result from wide-sweeping reviews of the interaction of government, government agencies, professional associations and practitioners.</p> <p>Drawing on the expertise and insights of the panellists, from a regulatory and an accounting perspective, this session will:</p> <ul style="list-style-type: none">• Examine the new breach reporting rules which impose new obligations on registered tax and BAS agents• Consider other important legislative changes that affect the regulation of practitioners• Consider how practitioners can manage their role as guardians of the tax system while fulfilling their legal obligations to their clients and themselves• Look at the role of the TPB and how it will administer the new rules; and• Work through a range of issues that practitioners will face in complying with their new obligations.
12:30 – 1:30pm	Lunch

Technical program

Day 2 Friday, 18 October 2024 continued

Time	Session
1:30 – 2:30pm	<p>Session 8: Capital management essentials – Navigating dividends, imputation, and capital transactions Speakers: James Hudson, FTI, Deloitte, Peter Scott, FTI, King & Wood Mallesons</p> <p>Join our two expert presenters as they delve into the fundamental aspects of capital management, focusing on the small and medium enterprise (SME) market. This session will provide practical insights and essential tips for advisers working with SMEs, covering key areas such as dividends, imputation, and imputation integrity. The presenters will also explore the complexities of capital transactions, deemed dividends, demergers, and capital streaming within the context of SMEs.</p> <p>Through real-world examples and case studies tailored to the SME market, attendees will gain a deeper understanding of potential pitfalls and common traps that advisers may encounter in these areas. The presenters will share their expertise on how to effectively navigate these challenges and optimise capital management strategies for SMEs, while also discussing recent legislative changes that impact this space.</p>
2:30 – 3:30pm	<p>Session 9: Division 7A – Some things you may not know Speaker: Todd Want, CTA, William Buck</p> <p>Through the use of case studies and real-life examples, this practical session will dig into a number of important Division 7A issues that often don't get the coverage that they should.</p> <p>Some of the areas that will be addressed include:</p> <ul style="list-style-type: none">• When is a repayment not a 'repayment' for Division 7A• Which entity did the loan really come from and go to• Can a loan or use of a company asset for private purposes be caught under both Division 7A and FBT at the same time• Is using a 25-year loan the hidden diamond in the Division 7A rough; and• Who is taxed on a deemed dividend and is it actually as problematic as you might think.
3:30pm	Convention close



Presenters

Kiara Calvert is a Partner at Hamilton Calvert Advisory, distinguishing herself as Tasmania's newest and youngest Registered Liquidator, Trustee in Bankruptcy and Small Business Restructuring Practitioner with over 12 years of industry experience in both corporate and personal insolvency. Kiara is also on the Board of ARITA's Small Practice Committee, providing a voice for the Tasmanian Insolvency profession.

Cedric Hodges, leads Deloitte Access Economics in Tasmania and South Australia. He also leads the national economic modelling team. Over five years he and the team have delivered hundreds of different modelling engagements, including many on the potential economic impact of various tax reform proposals. Cedric worked in the Commonwealth Treasury modelling team for over five years, where he helped develop their in-house CGE model and delivered the modelling behind government climate change policy (a carbon price). In addition to his work with Deloitte and the Treasury, Cedric is currently completing his PhD at ANU, analysing the potential impacts of declining fossil-fuel demand on the Australian economy.

James Hudson FTI, is a Director in the Tax & Legal team at Deloitte and specialises in providing strategic tax advice to private businesses, family offices, and high net worth individuals. James holds a Bachelor of Economics and Bachelor of Laws with Honours in Law from the University of Tasmania. His expertise spans a wide range of areas, including tax structuring (domestic and international), advisory, risk management and compliance

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 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.

Lyndal Kimpton, ATI, is a partner at Ruddicks, an independent Launceston based Chartered Accounting firm. Having moved from Hobart, Lyndal commenced her working career in Launceston as an Administrative Services Officer with the Department of Defence. Lyndal came into Accounting as a mature age student when she completed her Bachelor of Commerce degree via distance education whilst working in this role. Lyndal graduated from Deakin University in 2003 when she joined the team at Ruddicks. Lyndal has worked her way up from graduate to becoming a partner in 2016. Lyndal's expertise lies in the areas of audit, financial reporting, superannuation and business advice and is a registered company auditor, registered tax agent and an approved SMSF auditor. Lyndal currently sits on the Professional Conduct Committee for CA ANZ, is a member of CA ANZ Rural and Regional Advisory Committee, is a member of the Australian Institute of Company Directors and also holds

a number of other directorship and volunteer positions.

Janette Luu commenced working at the Tax Practitioners Board in 2010 as the Senior Adviser to the inaugural Chair of the Board. She is currently the Assistant Secretary of the Board with responsibility for Policy and Legislation, Governance and Reform.

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.

Peter Scott, FTI, is a Senior Associate in the tax team at King & Wood Mallesons. Peter's practice covers transactional matters with a focus on funds, private clients, M&A, banking and finance, general corporate and international tax as well as controversy matters. Peter holds a BBus and LLB (Hons I) from the University of Tasmania and an LLM from the University of Sydney and has lectured at the University of Tasmania.

Presenters

Allan Swan is Director of the Estate Planning Equation. Allan works with private clients and their accountants, financial advisors and legal practitioners relating to the legal aspects of Preventative Law such as asset protection, deceased estate taxation, dispute prevention, estate planning, prevention strategies, special disability & protective trusts, statutory Wills, structuring, superannuation, tax considerations and testamentary & family trusts. Allan also provides practitioner training and speaking services in the above areas and is an adjunct lecturer in the College of Law's applied law masters program. He is also an instructor for the Leo Cussen Centre for Law, the Law Institute of Victoria and other professional bodies. Allan is accredited as a STEP Trust and Estate Practitioner. Allan holds degrees in Law and Economics and a Graduate Diploma in Financial Services.

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.

Todd Want, CTA, is the Partner in charge of the Tax Services division at William Buck in Sydney, where he specialises in private client tax matters. Todd advises his clients on a broad range of tax issues, while he also provides specialist consulting services to accountants, lawyers, financial planners and other professionals in public practice to assist them in advising their clients. Todd is also the current President of The Tax Institute and a regular presenter at various Tax Institute conferences and events.



Venue and accommodation



Hotel Grand Chancellor Hobart

1 Davey St, Hobart TAS 7000

Hotel Grand Chancellor Hobart is a 4 ½ star leading hotel. Perfectly positioned directly on Hobart’s waterfront, the Hotel Grand Chancellor offers stunning views of the River Derwent and surrounds. The central location means that it’s a short walk from all areas of the city and major attractions, with Salamanca, Battery Point, city centre shopping and the MONA ferry only a few minutes walk away. Discover the very best of Hobart at Hotel Grand Chancellor, where style and convenience blend seamlessly to offer you the perfect waterfront accommodation experience.

Getting there

Hotel Grand Chancellor Hobart is located at 1 Davey Street, Hobart, 18kms away from Hobart International Airport it’s a 20-minute drive via the Tasman Highway. Sky bus, driving, taxi, or transfer information can all be found [here](#).

Parking

Secure undercover parking is located onsite, subject to availability. Please note that charges will apply for this service. Additional parking is located a short walk from the Hotel at Market Place Carpark (open 24hours), Dunn Street Carpark as well as on street metered parking. For prices and further information, [click here](#).

Accommodation

Favourable room rates have been negotiated and secured at Hotel Grand Chancellor Hobart. Accommodation bookings can be made by following the link on the even web page or by [clicking here](#). Please ensure you click the “**access special rates here**” button at the bottom of the page to access the special rate.

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

Convention dinner

A convention dinner will be held on Thursday from 7.00pm at the AURA Crowne Plaza Hobart. The convention dinner is included in the full registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$165. Please indicate your requirements, including dietary requirements, at the time of registration.

Continuing Professional Development (CPD)

Attendance at the convention 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 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.

If a registered delegate is unable to attend as a result of a diagnosis of COVID-19 or they are experiencing symptoms of COVID-19, a full refund will be offered with the provision that a medical certificate is produced explaining the diagnosis or a summary of the appropriate action to be taken i.e. a COVID-19 test and medical advice.

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/ convention lunches	Convention dinner and networking*
Full registration This registration option entitles one delegate to attend the entire event.	✓✓	✓✓	✓✓

*Additional tickets to the Networking function can be purchased on the registration form.

Discounts

Registration inclusions

Full convention registration includes participation in the full technical program, electronic access to all available materials via the Tasmanian Convention Virtual Attendee Hub, attendance at the convention dinner and all refreshments during convention hours. Registration fees do not include travel, accommodation, or hotel incidentals.

Early bird registration

All registrations received and paid on or before 20 September 2024 will be entitled to an early bird discount.

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





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.

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

1 Registration

Please see page 13 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member	Non-member
Early bird registration Register on or before 20 September 2024	<input type="checkbox"/> \$1,400	<input type="checkbox"/> \$1,790	<input type="checkbox"/> \$1,700
Standard registration Register after 20 September 2024	<input type="checkbox"/> \$1,600	<input type="checkbox"/> \$1,990	<input type="checkbox"/> \$1,900

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

Convention Dinner

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

Thursday, 17 October at the AURA Crowne Plaza Hobart

- Yes, I WILL be attending the convention dinner OR
- No, I WILL NOT be attending the convention dinner
- Yes, I require additional tickets for the convention dinner at \$165 per person

No. x tickets at \$165 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

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 Payment summary

Registration fees \$

Additional guest tickets – Convention dinner (\$165) \$

Total payable \$

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

4 Payment method

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

- Cheque payable to The Tax Institute** (in Australian dollars)
- Credit card** Card type: AMEX Visa MasterCard Diners

Name on card:

Card no.: Expiry date:

Cardholder's signature:

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

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

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

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To register

Email customeradmin@taxinstitute.com.au

Mail Level 21, 60 Margaret Street, Sydney NSW 2000

Online taxinstitute.com.au

Join the conversation

-  [linkedin.com/school/the-tax-institute](https://www.linkedin.com/school/the-tax-institute)
-  [facebook.com/thetaxinstitute](https://www.facebook.com/thetaxinstitute)
-  twitter.com/taxinstituteoz
-  [instagram.com/thetaxinstitute_](https://www.instagram.com/thetaxinstitute_)

