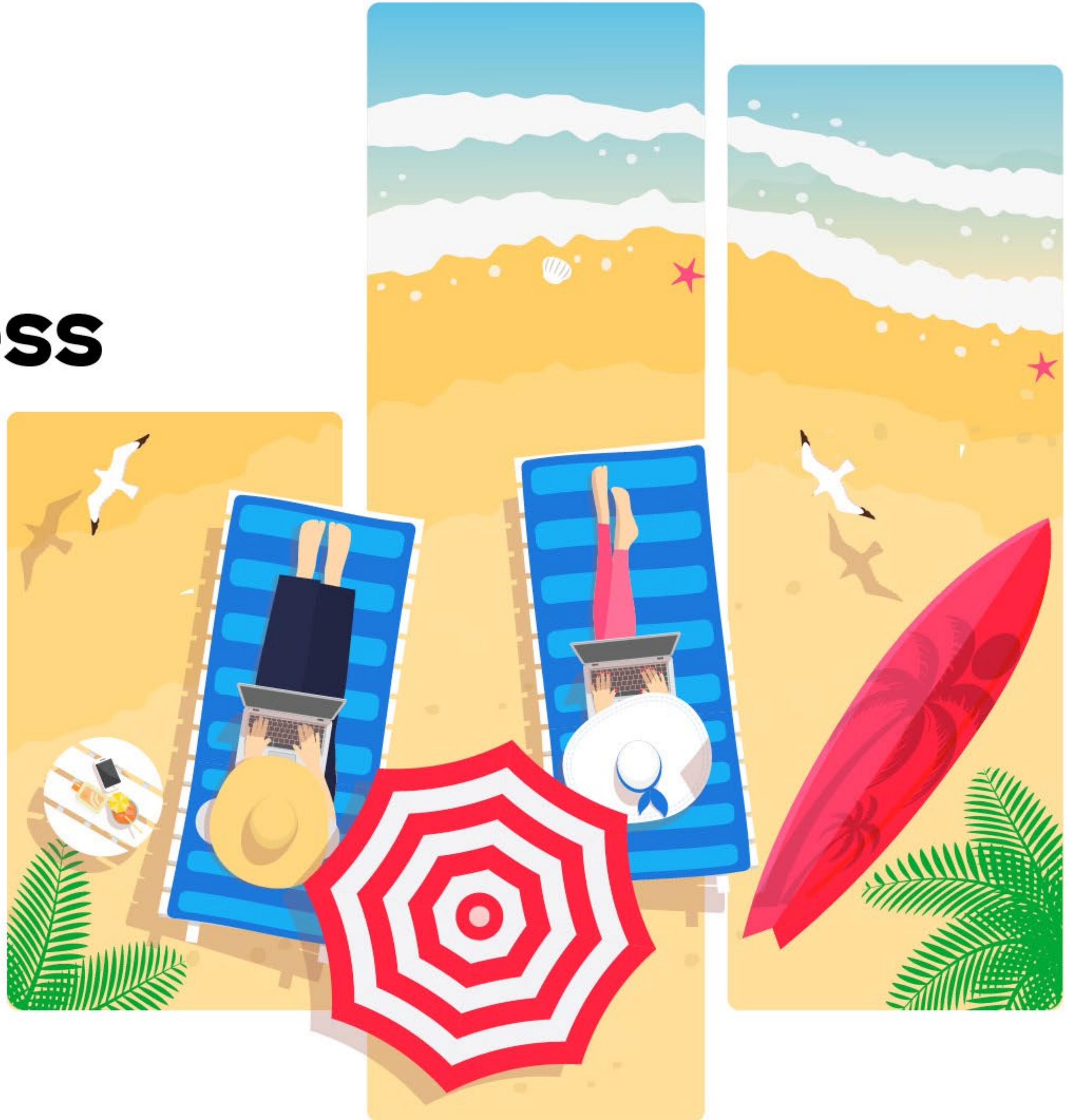
The Tax Institute

Private Business Tax Retreat

27–28 February 2025

JW Marriott Gold Coast Resort & Spa & Online

12 CPD hours



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

Jacquii Burnham, CTA, Chair, Private Business Tax Retreat Organising Committee
Neil Brydges, CTA, Sladen Legal
Bruce Collins, CTA, Tax Controversy Partners
Dominic Moon, ATI, Macpherson Kelley
Jonathan Ortner, FTI, Arnold Bloch Leibler
Melinda Peters, CTA, McCullough Robertson
Jodie Robinson, CTA, McCullough Robertson

Welcome

The premier summer getaway event for SME experts

The Private Business Tax Retreat is returning to the heart of the Gold Coast, and I'm excited to chair the event. I'd like to thank my fellow organising committee members for crafting a program that addresses the key issues facing your SME clients.

The Private Business Tax Retreat is the ideal setting for two days of in-depth discussions. Designed by a committee of legal and accounting professionals from across Australia, this year's program promises to provide you with expert knowledge essential for your daily practice. Whether you work with family-owned businesses or expanding SMEs, the retreat will offer key insights relevant to every practitioner.

The perfect balance between technical content and practical takeaways

Our expert-led program offers a unique opportunity to dive deep into discussions that not only deepen your understanding but also equip you with actionable strategies to apply in your practice immediately. Explore key topics, including tax governance with insights from our ATO panellists, managing tax uncertainties in the current environment, to navigating the complexities of payroll tax and tax planning. In today's global economy, this year's program will also address international tax issues relevant to your foreign-owned clients and clients who are expanding offshore. If you're considering expanding your client base or advising clients with overseas investors or overseas expansion plans, this retreat will equip you with all the insights you need to succeed. Don't miss out on this chance to stay ahead in a rapidly changing landscape.

When tax knowledge meets fun activities and meaningful connections

The Private Business Tax Retreat is a refreshing escape for both your mind and spirit, far from the distractions of the office! With 12 CPD hours on offer and a fantastic networking dinner hosted at the Tamborine Gallery, this event is designed to provide you with the perfect space to absorb cutting-edge tax insights and forge meaningful connections with your peers.

Whether you prefer in-person engagement or the convenience of attending from home at your own pace with our online option, we have you covered!

Join us this February to kickstart the year while extending your summer break, we can't wait to welcome you!

Jacquii Burnham, CTA
Chair, Retreat Organising Committee

Early pricing offer ends on Friday 31 January 2025!

Technical program

Day 1 Thursday, 27 February 2025

Time *AEST	Session
8:00 – 8:30am	**Registration**
8:30 – 9:00am	**Welcome and President's address** **Jacquii Burnham, CTA, Chair, Private Business Tax Retreat Organising Committee together with the 2025 President of The Tax Institute.**
9:00 – 10:00am	**Session 1: Understanding your latest obligations with TASA** **Speaker: Robyn Jacobson, CTA, The Tax Institute** This session will explain the recent legislative changes to the Code of Professional Conduct in the Tax Agent Services Act 2009 (TASA). Using case studies, the session will cover: • What's changed? • Practitioners' new obligations under TASA, and • The Tax Practitioners Board's compliance approach.
10:00 – 10:30am	**Morning tea**
10:30 – 11:30am	**Session 2: Is tax planning dead? Part IVA cases** **Speaker: Chris Peadon, FTI, New Chambers** Tax planning in Australia is becoming increasingly complex from a revenue law perspective, raising complex revenue law considerations. The recent spate of Part IVA cases (particularly in the context of trusts used in tax planning) has left many advisers wondering where the boundary is in terms of 'permissible tax planning?' This session will look at the myriad of integrity measures applicable to advisers undertaking tax planning activities for their clients, by reference to recent case law and how the principles considered by these cases might apply more broadly to small businesses or investments held via a family trust. It will also examine examples of legitimate tax planning versus risky tax planning and explore how to mitigate risks as advisers.
11:30am – 12:30pm	**Session 3: Understanding trust resolutions: Key year end considerations for advisers** **Speakers: Elizabeth Allen, Macpherson Kelley, Emma Carr, Macpherson Kelley** Join us for a concise and practical session where we will dive into the critical elements of preparing effective trust resolutions. This presentation will cover: • Understanding drafting nuances and avoiding common pitfalls • Clarifying who qualifies as a beneficiary, including distributing to another trust • Navigating streaming powers and incorporating them appropriately into a resolution; and • Considering whether or not a variation can be made to achieve desired outcomes.

Technical program

Day 1 Thursday, 27 February 2025 continued

Time *AEST	Session
12:30 – 1:30pm	**Lunch**
1:30 – 2:30pm	**Session 4: Family trust elections – Risks and pitfalls** **Speaker: Jonathan Ortner, FTI, Arnold Bloch Leibler** This presentation will address the main situations in which an FTE or IEE may be required and sets out some of the risks and pitfalls and planning opportunities associated with making an FTE, including by reference to practical case studies.
2:30 – 3:30pm	**Session 5: Managing tax uncertainty for private groups** **Speaker: Bruce Collins, CTA, Tax Controversy** What is your client to do in circumstances where there is more than one conclusion reasonably available? How can you give them comfort to move forward in their life and business notwithstanding? In this session we take a practical look at how to manage the risk of "getting it wrong" (or at least the ATO taking a view different to yours). We will consider: • What strategies are available for resolving this uncertainty • When is a RAPP preferable to a private ruling, and vice versa? • What are the alternatives to applying for a private ruling? • What about the impact of Practical Compliance Guidelines – are PCGs LAW or LORE? • Weighing up the penalty risk; and • How to best engage with the ATO to maximise your

Technical program

Day 1 Thursday, 27 February 2025 continued

Time *AEST	Session
3:30–4:00pm	**Afternoon tea**
4:00–5:00pm	**Session 6: Tax Governance Next 5000 – What are they looking for?** Panellists: Melisa Hall, Australian Taxation Office, David Hughes, CTA, McCullough Robertson, Troy Whelan, Australian Taxation Office Facilitator: Jacquii Burnham, CTA, KPMG This interactive panel session will cover: • Understanding the ATO's Compliance Framework and insights into the private groups tax performance programs and their implications for governance • Key focus areas of the Next 5000 initiative – What the ATO is looking for from participating groups and how to align with their expectations • Effective tax governance strategies and practical approaches for enhancing tax governance and ensuring compliance • Preparing for ATO reviews and tips on proactive engagement and best practices for navigating the review process; and • Future challenges in tax compliance and exploring emerging trends and potential hurdles for private groups in the evolving tax landscape.
5:00–6:30pm	**Delegate free time**
6:30pm	**Retreat dinner**

Retreat Dinner

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

The official retreat dinner will be held in the Tamborine Gallery at the JW Marriott Gold Coast Resort & Spa. Enjoy an evening of relaxed elegance as we celebrate the Gold Coast's vibrant atmosphere with great food and company.

Date: Thursday, 27 February 2025

Time: 6:30–9:30pm

Venue: Tamborine Gallery, JW Marriott Gold Coast Resort & Spa

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

Dress: Business casual

Technical program

Day 2 Friday, 28 February 2025

Time *AEST	Session
8:30 – 9:30am	**Session 7: The (accidental) outbound tax adviser** **Speaker: Michael Cranston, FTI, Waterhouse Lawyers** Many SMEs are expanding offshore, which introduces additional internationally-focused tax issues on top of the domestic tax rules. This session will cover the key takeaways for [smaller] Australian tax advisers to help identify and manage the issues that such SME/Private Business clients are likely to encounter in practice, including: • Double Tax Agreement – shield or sword? • Transfer pricing • Foreign affiliate attribution rules • Foreign Tax Offset entitlements • General Anti-Avoidance Rule risks, and • Foreign tax liabilities.
9:30 – 10:30am	**Session 8: International tax issues for your foreign owned client** **Speaker: Nicole Bryant, FTI, The Macro Group** Many of you read this session title & thought… this doesn't impact me. My client base is family-owned SMEs. However, think through your client base. There are likely several clients who have foreign ownership – a family member based offshore, private equity from overseas, or a larger industry player investing in your client who is foreign owned. It is important to be across the changes if you have clients that have foreign owners or foreign investments. This practical session is designed to highlight the issues facing SME advisors when their client has overseas investors, including: • Withholding tax obligations for companies and trusts • New Thin Cap rules application to private groups • Conduit Foreign Income Rules & their impact on dividends to foreign shareholders • Hybrid Mismatch rules • ignificant Global Entity & country-by-country reporting obligations • Reportable Tax Position

Technical program

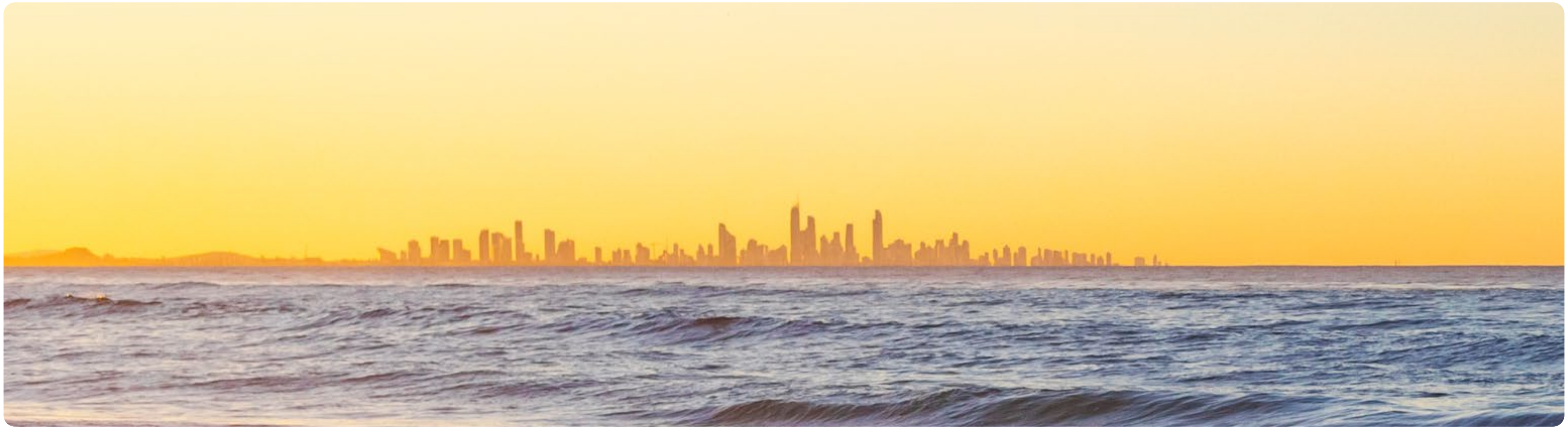
Day 2 Friday, 28 February 2025 continued

Time *AEST	Session
10:30 – 11:00am	**Morning tea**
11:00am – 12:30pm	**Session 9: Hot topics round up** **Speakers: Joey Borenzstajn AM, Arnold Bloch Leibler, Jonathan Ortner, FTI, Arnold Bloch Leibler, and Melinda Peters, CTA, McCullough Robertson** This three-part session will discuss the latest issues impacting private business tax advisers.
12:30 – 1:30pm	**Lunch**
1:30 – 2:30pm	**Session 10: State tax issues – Hot topics in Payroll Tax** **Speaker: Matthew McKee, FTI, Brown Wright Stein Lawyers** Payroll tax continues to cause issues for businesses and seemingly remains one of the low-hanging fruits for State Revenue Offices. With reviews often resulting in unexpected payroll tax assessments dating back five years, it is critical for advisers to understand how to spot the common payroll tax mistakes and what are the hot topics that are currently the focus of the State authorities. This session will explore: • How businesses can be grouped – the problem is not just common directors • Grouping issues arising from using administrative service entities • Contractor confusion – the mystery of ‘relevant contracts’ and the recent cases of: • *Uber Australia Pty Ltd v Chief Commissioner of State Revenue* [2024] NSWSC 1124 • *Loan Market Group Pty Ltd v Chief Commissioner of State Revenue*; *Loan Market Pty Ltd v Chief Commissioner of State Revenue* [2024] NSWSC 390; and • Contractor exemptions.
2:30 – 3:00pm	**Afternoon tea**

Technical program

Day 2 Friday, 28 February 2025 continued

Time *AEST	Session
3:00–4:00pm	**Session 11: Three-hundred-pound gorillas and elephants in the room – Strategies to deal with ATO debt recovery action** Panellists: Jason Bettles, Worrells, Bruce Collins, CTA, Tax Controversy Partners, and Stacy Miller, Cronin Miller Facilitator: Neil Brydges, CTA, Sladen Legal The Australian Taxation Office (ATO) is actively seeking payment of tax liabilities. The Commissioner's recovery powers are extensive, and many businesses are facing the prospect of aggressive recovery action. This session will discuss practical strategies for dealing with the ATO in managing their ATO debt including: • ATO's current small business and private wealth debt collection strategies • ATO statutory powers to collect debts • ATO use of general creditor powers to collect debts • Scrutineer and stakeholder feedback on the current ATO debt collection approaches, and • Strategies to better manage ATO debt collection activities affecting small business and private wealth clients.
4:00pm	**Closing address**



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.

Jason Bettles, is a Registered Liquidator, Chartered Accountant (CA ANZ), and a professional member of the Australian Restructuring Insolvency & Turnaround Association. He has worked exclusively in the field of insolvency since 1995, and been with the Worrells family since 2004. Jason has experience in all forms of corporate and personal insolvency matters. He has provided recommendations on the most appropriate solutions to deal with insolvency issues to all types of parties. Jason's knowledge and experience allows him to consider informal arrangements to solve insolvency problems, as well as the formal insolvency administrations.

Nicole Bryant, FTI, is Chartered Accountant, Australian Registered Tax Agent, and US CPA (California) with 30 years' experience in taxation in Australia and the US. Nicole's current role is Managing Director of The Macro Group Chartered Accountants, which she acquired in 2014. Prior to owning this boutique practice, Nicole was the Vice President of International Tax for Billabong International Limited, responsible for all global taxation matters for this then ASX listed entity. Nicole also spent 16 years at PricewaterhouseCoopers, with nearly 5 of those years as a Tax Partner.

In addition to her achievements in Australian & international tax, Nicole continues to provide US tax services and advice to clients through her own practice. Her passion for innovative long-term strategic planning and practical detail-driven solutions allows her to continually create positive outcomes for her clients. Nicole has a Bachelor of Commerce, a Master of Taxation, and is a Fellow of the Taxation Institute of Australia.

Neil Brydges, CTA, is a Principal in Sladen Legal's tax group. Neil primarily practises in direct taxes and GST, with a focus on the taxation of trusts, deceased estates, property, corporate tax, M&A and Division 7A. Neil has also advised extensively on cross-border taxation issues. Neil is an Accredited Specialist in Taxation Law and a member of the Tax & Revenue Law Committee with the Law Institute of Victoria, a member of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser and member of the Dispute Resolution Technical Committee with The Tax Institute.

Joseph Borensztajn AM, has over 40 years' experience in commercial and taxation law. He is a commercial lawyer with an extensive private client practice and has a deep knowledge of taxation, trusts, estate and business succession planning and philanthropy and charitable giving. Joey has a quiet, understated approach, which belies his very achievement-focused practice. He has an outstanding rapport with clients who seek him out for his vast experience and skills. He has been a partner of Arnold Bloch Leibler since 1991. Arnold Bloch Leibler represents, a diverse group of charitable and not-for-profit organisations that are active in the cultural, health, welfare, religious, Indigenous and environmental sectors, and advises on all aspects of their establishment, access to available tax concessions, tax, governance, privacy, IP, workplace advisory, property and day-to-day operations. The firm is widely regarded as being one of the foremost law firms in relation to Private and Public Ancillary Funds – Joey and his team have helped the firm's clients establish over 150 ATO approved Private and Public Ancillary Funds. Joey also holds various committee and director roles in a range of charitable and not-for-profit organisations and until recently was a member of the ATO Not-for-Profit Stewardship Group.

Emma Carr, is a lawyer at Macpherson Kelley, known for her client-centred approach and delivery of practical solutions. Emma provides transaction and structuring advice on federal taxes and state taxes Australia-wide, including advising on exemptions for restructuring and intergenerational transfers. Emma also assists clients in navigating compliance activity – practically and commercially. Much of Emma's practice involves advising on employment and remuneration matters relating to employee and executive remuneration including, particularly, in respect of payroll tax.

Bruce Collins, CTA, worked for over 35 years in the Tax Office, a third of this time as a Senior Executive in what is now Client Engagement Group. While with the ATO, Bruce worked as a technical and strategic leader covering its legislative, interpretative, private advice, public advice, compliance, audit, investigative, prosecution, objection, dispute resolution and litigation functions. After he left the ATO in 2017, in addition to running a small

Presenters

business advisory firm, Bruce worked in private practice for a couple of years as a legal contractor and an employee solicitor before deciding to start his own firm. In May 2021, Bruce set up the boutique tax law firm Tax Controversy Partners Pty Limited, specialising in assisting individuals, small businesses and private groups. Bruce helps clients to navigate the many uncertainties in the tax and super system, drawing upon his previous experience with the ATO on the other side of the fence.

Michael Cranston, has a Masters of Taxation from University of Sydney. In addition, he completed a Bachelor of Commerce majoring in Accounting. He is also a Fellow of the Tax Institute of Australia. With over 40 years experience with the ATO, the last ten as Deputy Commissioner for Private Groups and Individuals, Michael understands the complex tax laws, commercial aspects of business and difficulties facing taxpayers. For the past 6 years Michael has been a partner in Waterhouse Taxation lawyers and provide tax advice and engages with the ATO especially in relation to tax audits and disputes. Michael's strong mediation skills allow him to negotiate and achieve the best result possible for taxpayers. Michael loves playing golf, enjoys being a grandfather and a fine red.

Melisa Hall is a Director of a Brisbane Private Wealth Team and has also had a variety of roles in her 22 years in taxation office. These have included team leading roles in financial crime and cash economy, working in the AFP lead National Anti-Gang Task Force and is currently a large private group relationship manager. Melisa believes that building relationships and working with taxpayers and agents results in the best outcome for all parties.

David Hughes, CTA, is a Partner at McCullough Robertson and a Queensland Law Society Accredited Specialist in taxation law. David acts for clients throughout Australia and offshore in relation to navigating cross-border taxation issues, including structuring advice and taxation disputes with the ATO, including audits, objections and running appeals in the High Court, Federal Court and the Administrative Appeals Tribunal against excessive tax assessments. David has also taken court action to prevent the ATO from taking illegal enforcement action, including successfully overturning departure prohibition orders.

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.

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.

Stacy Miller, is a partner of Gold Coast based firm Cronin Miller Litigation. Since her admission in January 2003 she has practiced exclusively in the areas of commercial litigation, insolvency, debt recovery and dispute resolution and now leads a team of lawyers specialising in those practice areas. With a special interest in personal and corporate insolvency, Stacy advises directors as well as insolvency practitioners in relation to all matters arising in bankruptcy and external administrations. A highly regarded litigator with notable success in factually complex high end litigation cases, Stacy has featured as Recommended in the Doyles Guide for Leading Commercial Litigation and Dispute Resolutions Lawyers in Queensland in 2023 and 2024.

Jonathan Ortner, FTI, is a partner in Arnold Bloch Leibler's taxation group and practices in all areas of direct and indirect tax with a particular focus on the taxation of trusts and corporate income tax and mergers and acquisitions. Using his technical tax knowledge, Jonathan works with clients to obtain commercial and

Presenters

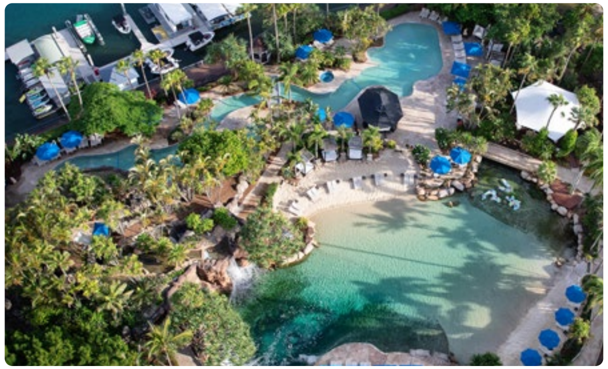
practical outcomes. He has particular experience in dealing with the Australian Taxation Office on complex tax issues in a dispute resolution and transactional context. Jonathan is a keen and active member of the tax community. As well as presenting on tax topics at various sessions and authoring a number of published articles, papers and bulletins, Jonathan is the Chair of the Tax Institute's SME committee, a former member of the GST committee and the co-chair of the ATO's Private Group Stewardship Group. Jonathan is also recognised as a key tax lawyer in the Legal 500 Asia Pacific and Best Lawyers® International and is recommended by Who's Who Legal: Australia and New Zealand 2023 report, in the area of corporate tax.

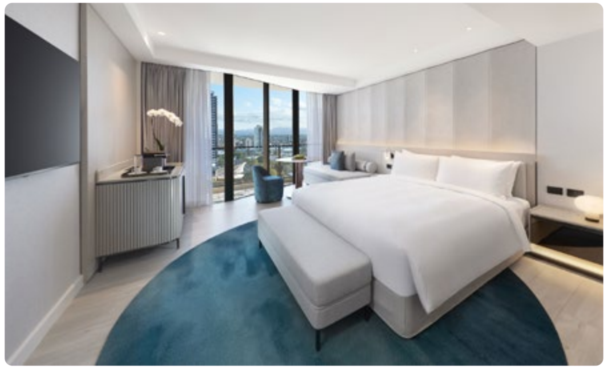
Chris Peadon, FTI, is a Barrister at New Chambers and has practised at the NSW Bar since 2011. He previously worked as a solicitor for a decade. He regularly advises and appears for taxpayers and the Commissioner.

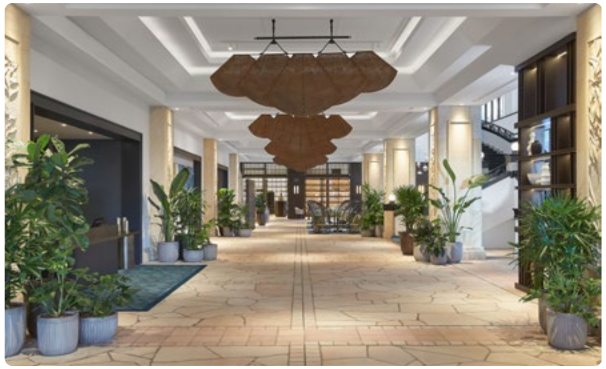
Melinda Peters, CTA, is a specialist tax and duty lawyer, practising in all areas of direct and indirect tax – with a particular focus on the transaction taxes, structuring and funds management. A partner in McCullough Robertson's highly regarded taxation team and a chartered tax adviser, Melinda prides herself on achieving commercial outcomes and providing practical advice to clients. In her role, Melinda acts for a range of clients, from individuals to start ups, to large corporate clients and managed funds. She advises extensively on cross-border taxation issues and inbound and outbound investment structures, mergers and acquisitions, trusts and is experienced in advising and implementing a range of employee incentive and remuneration arrangements. She also assists clients with taxation and duty disputes and has experience in such matters before the Federal Court, AAT and Queensland Supreme Court. Melinda holds a Juris Doctor from the University of Queensland and a Masters of Taxation from the University of Sydney.

Troy Whelan is the Queensland Regional Director of Private Group for the Australian Tax Office since 2018. Troy's past roles including leading the National Criminal Investigation capability which led to several well-known national tax prosecutions, aggressive tax planning and property and construction national risk manager. In working with private groups Troy's focus is on not only on resolution but prevention and governance to bring about systemic change.

Venue and accommodation







JW Marriott Gold Coast Resort & Spa

158 Ferny Ave, Surfers Paradise QLD, 4217

JW Marriott Gold Coast Resort & Spa boasts brand-new guest rooms, award-winning service and a covetable location on Australia's Gold Coast. Our redesigned hotel rooms and suites offer an ideal setting to relax after a busy day, complete with high-speed Wi-Fi, plush bedding and pristine marble bathrooms. Wake up feeling refreshed and take advantage of our superb resort facilities, from peaceful saltwater lagoons and an outdoor freshwater pool with a slide to a modern fitness centre and Sport Court®.

Getting there

The JW Marriott Gold Coast Resort & Spa is approximately a 40-minute drive from Gold Coast Airport or a one-and-a-half hour drive from Brisbane Airport.

Parking

Car parking is $24 per day for self-parking or $35 per day for valet parking.

Accommodation

Favourable room rates have been negotiated and secured at the JW Marriott Gold Coast Resort & Spa. Accommodation bookings can be made through JW Marriott Gold Coast Resort & Spa, by following the link on the event web page or by clicking the link here.

Please note that as per hotel booking conditions, all accommodation booked is non-refundable. All additional hotel incidentals, including breakfast, remain the responsibility of delegates, and individuals will be responsible for payment of the balance of their account when checking out of the hotel. Please note that extra charges may be incurred for additional guests and will be charged to individual room accounts upon checkout.

Event information

Confirmation of registration

Please note you will receive two separate emails in the form of a tax invoice at the time of payment and a confirmation email at registration completion.

Continuing Professional Development (CPD)

Attendance at the 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

Retreat Dinner – Thursday, 27 February 2025

The retreat dinner will be held on-site at the Tamborine Gallery.

The retreat dinner is included in the event registration fee for delegates, and additional tickets can be purchased for accompanying persons and guests at a cost of $150.

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

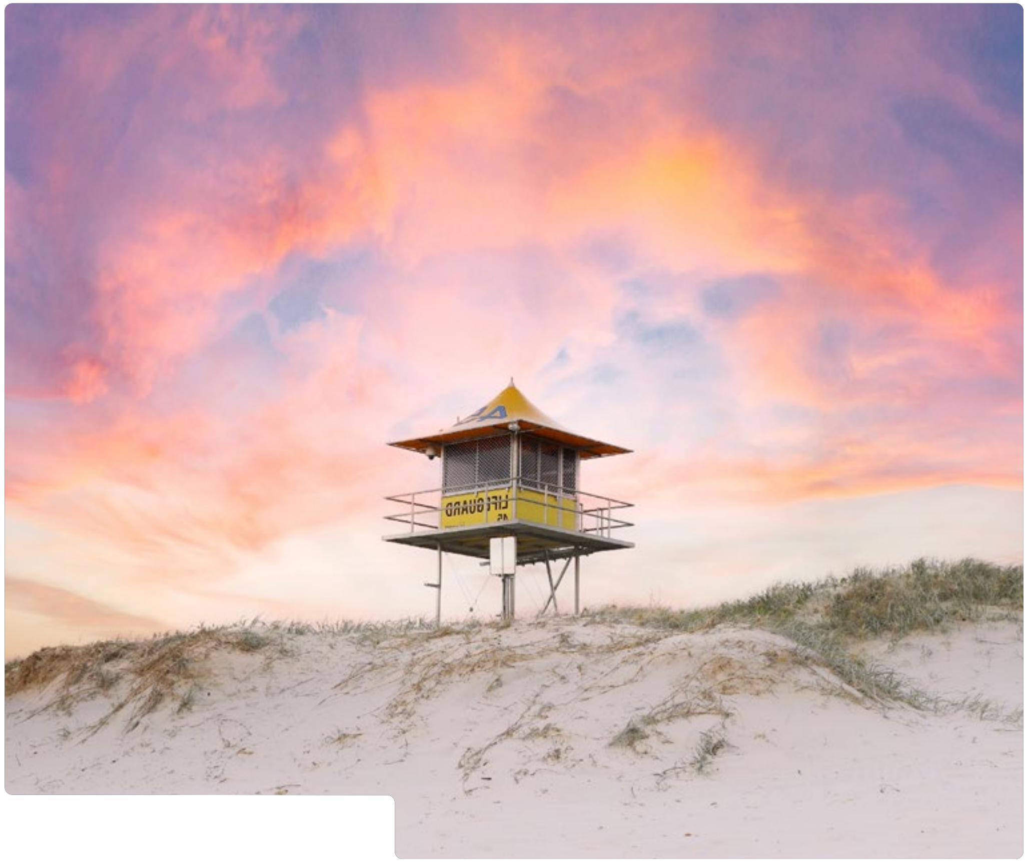
	Online access to presentations and technical papers	Morning/ afternoon tea/ lunches	Retreat dinner networking function*
Full registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓
Online Full Registration This registration option entitles one delegate to attend he entire event virtually.	✓		

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

Register now!

Register online ▶

Register via form ▶
included in this brochure



Discounts

Early bird registration

All registrations received and paid on or before Friday, 31 January 2025 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.

Private Business Tax Retreat
Registration form

The Tax Institute

44189 | 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 15 for registration inclusions.

Full registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 31 January 2025	☐ $1,695	☐ $1,695	☐ $1,995
Standard registration Register after Friday 31 January 2025	☐ $1,895	☐ $1,895	☐ $2,195

Online registration – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Register on or before Friday, 31 January 2025	☐ $1,695	☐ $1,695	☐ $1,995
Standard registration Register after Friday 31 January 2025	☐ $1,895	☐ $1,895	☐ $2,195

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

Retreat dinner

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

Thursday, 27 February 2025 at the JW Marriott Gold Coast Resort & Spa

☐ Yes, I WILL be attending the Retreat dinner OR

☐ No, I WILL NOT be attending the Retreat dinner

☐ Yes, I require additional tickets for the Retreat dinner 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

25-001EVT_10/24

3 Payment summary

Registration fees $

Additional guest tickets – Retreat dinner ($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)

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