



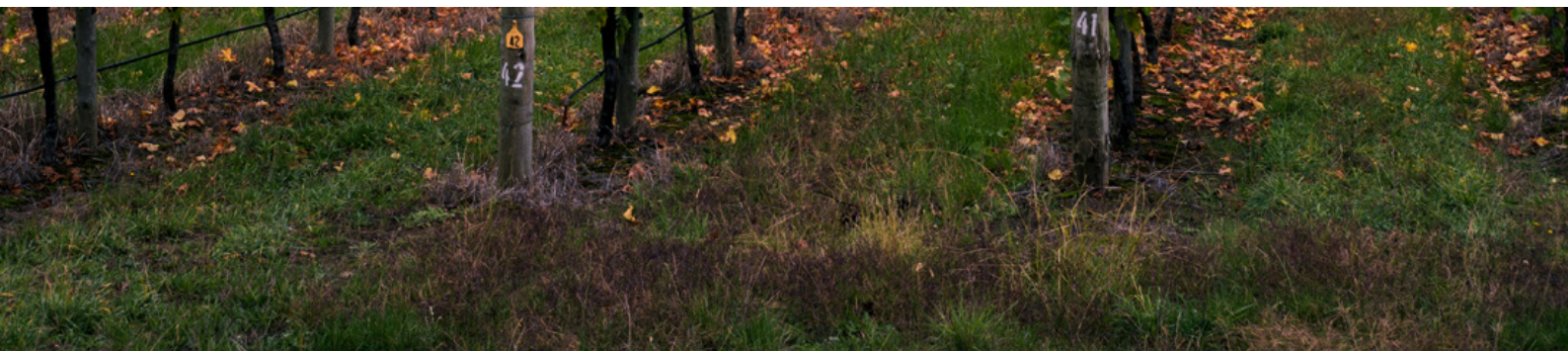
THE TAX INSTITUTE



2019 Barossa Convention

2–4 May 2019 | Novotel Barossa Valley Resort

11 CPD hours



Welcome

It is with great pleasure that I extend a warm welcome to you to join us in the picturesque surrounds of the historic Barossa Valley for the 2019 Barossa Convention, South Australia's premier event for tax professionals. There's ample reason to attend, including an outstanding line-up of local and interstate speakers presenting on topical issues that we collectively see confronting us in this ever changing environment.

High quality program

Distinguished keynote speakers headline the program: Professor Robert Breunig will address the urgent need for tax reform in Australia and exploring what this might look like and Professor Graeme Cooper, always a draw card at Tax Institute Conventions, will take a deeper look into the CGT regime and explore potential issues that can trip the unwary practitioner. The Friday morning program will be based around a case study with each session focusing on specific tax and legal aspects of a business group through time, including special commentary from the ATO. To round out the Convention a leading panel will look into the practical implications of the Division 7A reforms on our private clients.

Unique industry networking

With formal and informal networking events throughout the convention there's plenty of opportunity to meet up with friends and peers, old and new, from accounting, law, financial services and regulatory backgrounds. We've got some excellent entertainment planned too and combined with our Tax Safari theme for the Gala dinner there's sure to be plenty of laughs.

Idyllic destination and local activities

The Barossa Valley is an iconic destination for interstaters and locals alike. Take time to visit famous and yet discovered cellar doors before or after (not during!) the Convention. The Convention Resort overlooks rolling vineyards and you'll dine on fresh, local produce inspired by Saskia Beer, accompanied by quality Barossa Valley wines. We recommend you take the opportunity to extend your Barossa visit into the weekend.



Nicole Peterson, CTA
Chair, 2019 Barossa Convention
Organising Committee

Thank you

The Tax Institute gratefully acknowledges the generous assistance of members of the 2019 Barossa Convention Organising Committee:

Nicole Peterson, CTA, PKF Adelaide

Nick Conolan, EY

Leo Efthivoulou, CTA, ENA Law

Will Fennell, Piper Alderman

Melissa Harrison, Australian Taxation Office

George Hodson, CTA, Thomson Geer Lawyers

Francis Loh, CTA, Evans + Ayers

Sonia Mascolo, CTA, KPMG

Andrea Michaels, CTA, NDA Law

Andrew Nicola, CTA, William Buck

Neil Oakes, CTA, Perks

Tom Paltridge, CTA, Grant Thornton

Raoul Stevenson, CTA, Nexia Edwards Marshall

Ingrid Toth, CTA, Australian Tax Office

Advance pricing offer

Register on or before Friday 15 February to save!

Proudly supported by:



Technical program

Day 1 – Thursday 2 May 2019

Time	Session	Presenter
3.00pm–4.50pm	Registration	
4.50pm–5.05pm	Welcome and Opening Address	Nicole Peterson, CTA PKF Adelaide Tim Neilson, CTA 2019 President The Tax Institute
5.05pm–6.00pm	Session 1: Tax Policy Keynote Presentation Tax and the Economy – Policy and Performance When the federal tax system in Australia was initially created at the beginning of the twentieth century, the world was a very different place. It took 45 days to travel from London to Melbourne, we mostly exported agricultural products to Britain and total tax was about 5% of GDP. With at least 125 different taxes, 289 tax expenditures (known as exemptions) and a myriad of policies that give money back to people (known as transfers or negative income taxes), Australia's current tax system is a complex labyrinth. Evidence is mounting that our tax system is ill-suited to the demands of the twenty first century and that it faces increasing pressure from trends such as aging, globalisation and automation. This session will address: <ul style="list-style-type: none">— The urgent need for tax reform— Some ideas of what tax reform might look like— The importance and difficulty of communicating these ideas to broader audiences	Professor Robert Breunig Tax & Transfer Policy Institute, The Crawford School of Public Policy
6.00pm–6.45pm	Session 2: Tax Technical Keynote Presentation CGT Regime – The Unexpected Outcomes When tax on capital gains was added to the legislation, the CGT regime was meant to be internally coherent and then to fit comfortably with the rest of the income tax. The experience of the last 30 years has revealed a lot of cracks, fault lines and holes: the CGT is not always internally consistent and it often sits uneasily with the rest of the income tax. This session will examine some of the design problems and show how they can trip up unwary practitioners and expose clients to unexpected and illogical outcomes.	Professor Graeme Cooper, FTI University of Sydney Law School
6.45pm	Stand-up welcome dinner at the Novotel Barossa Valley Resort, proudly supported by Wine Direct	



Technical program continued

Day 2 – Friday 3 May 2019

Time	Session	Presenter
8.30am–8.45am	Case Study Introduction – Exploring the Tax and Legal Issues of a Business Group Sessions 3 to 6 will be based around a case study with each session focusing on specific tax and legal aspects of a business group through time. The series of case study presentations will be facilitated by George Hodson of Thomson Geer Lawyers and will have special ATO commentary by Simon Haines, Assistant Commissioner ATO.	George Hodson, CTA Thomson Geer Lawyers
8.45am–9.30am	Sessions 3: Case Study Part I – Small Business CGT – Changes to Concessions Recent amendments to the Small Business CGT Concessions, particularly the impact on share and unit sales, go well beyond what was initially only expected to be a simple integrity measure. Practitioners must now take the new provisions into account when reviewing the availability of the concessions. The session will consider: <ul style="list-style-type: none"> — How have changes to Small Business Concessions (SBC) impacted the ability to access the concessions? — The recent changes to the SBCs regarding the disposal of shares and units — Impact on clients reducing their share or unit holding interest — How could clients have otherwise structured the business group? 	Paul Tanti, CTA Thomson Geer Lawyers
9.30am–10.40am	Session 4: Case Study Part II – Restructuring Having abandoned the prospect of selling early, the client looks to restructure a business. The client has been operating through a less than optimal structure either because their business or other circumstances have changed or the right structure was not initially used. This session will consider the ways that a business and business assets can be restructured without adverse CGT, income tax or stamp duty consequences. The session will work through many aspects of restructuring a small business entity (or its assets) including: <ul style="list-style-type: none"> — Review of what restructuring avenues are available and how they can best be utilised. — Subdivision 328-G small business restructure rollover and where it will now play a greater role — Can the small business restructure rollover apply in conjunction with small business CGT concessions and other CGT rollovers? Is the restructure able to be used for succession planning purposes? — The potential application of Part IVA to a restructure and how to risk-manage the process. 	Peter Slegers, CTA Cowell Clarke
	Followed by ATO commentary on the issues raised in Session 3 and 4 by Simon Haines, Assistant Commissioner ATO.	Simon Haines, FTI Australian Taxation Office
10.40am–11.10am	Morning tea proudly supported by Clifton Hall	
11.10am–12.10pm	Session 5: Case Study Part III – Clients in Distress The tax opportunities and challenges for businesses are plentiful when the business is operating, but what happens when the business has reached its end and voluntarily, or compulsorily is placed into liquidation? What positives can be achieved from an otherwise negative situation? This session will practically work through the facts of the case study to explore the various tax issues and opportunities of liquidation with practical insights from Clifton Hall as to the administration and management of the liquidation. The session will consider: <ul style="list-style-type: none"> — Voluntary liquidation v deregistration — In-specie distributions — Archer Brothers Principle — Section 47(1) ITAA 1936 — Dividend v return of capital — Capital gains tax consequences. 	Nick Wilkins, CTA Nexia Edwards Marshall Tim Clifton Clifton Hall

Day 2 – Friday 3 May 2019 continued

Time	Session	Presenter
12.10pm–1.15pm	Session 6: Case Study Part IV – Losses The rules governing the preservation and use of losses within business structures are complex and often misunderstood. This session will work through practical case studies specifically on losses incurred in trust structures with a focus on: <ul style="list-style-type: none"> – Family trust elections – Trustee beneficiary reporting – Interposed entity election – Applying the trust loss rules to Family Trusts and traps to be aware of in order to maximise loss deductions – Definition of income and distributable income – Trustee distribution resolutions – Timing of use of losses – Interim trust distribution resolutions 	Alistair Hutson, CTA PwC Toni Harrington PwC
	Followed by ATO commentary on the issues raised in Session 5 and 6 by Simon Haines, FTI, Assistant Commissioner ATO.	Simon Haines, FTI Australian Taxation Office
1.15pm–2.00pm	Lunch proudly supported by Boileau Business Technology	
2.00pm–2.45pm	Session 7: Family Law Relationship breakdowns can be challenging even before the tax implications are considered. As many of our clients these days have multiple structures including companies, trusts and super funds, dealing with the division of assets and structure can present a number of wide ranging problems. While there is some relief from both capital gains tax and stamp duty for the transfer of assets following a relationship breakdown, the application of these exemptions is limited, thereby leaving clients exposed to potentially significant tax liabilities if the division of assets is not dealt with appropriately. This session will explore some of the complications that can arise when dealing with the division of assets in a relationship breakdown including: <ul style="list-style-type: none"> – Division 126-A rollovers and when they are, or are not, available – Stamp duty exemptions – Dealing with superannuation interests – Extracting wealth from companies – Division of assets held in family trusts – Powers of the family court and the importance of getting the orders right – Use of binding financial agreements 	Briony Hutchens, CTA DW Fox Tucker Lawyers
2.45pm–3.30pm	Session 8: Foreigner Provisions Both Federal and State Governments have been introducing a range of measures aimed at foreign persons and entities in recent years. Every trust in Australia has the potential of being impacted by these provisions. This session will consider: <ul style="list-style-type: none"> – South Australia's 'Foreign Ownership Surcharge' (FOS) – Other Federal and State legislative provisions, including: <ul style="list-style-type: none"> – Foreign Investment Review Board (FIRB) rules – Stamp duty surcharges – Land tax surcharges – Annual vacancy fees; and – With a particular focus on how these measures impact upon the drafting of discretionary family trust deeds. 	Paul Ingram, CTA Minter Ellison
3.30pm–3.45pm	Afternoon tea/social activities begin (see Event Information page for further detail)	

Technical program continued

Day 2 – Friday 3 May 2019 continued

Time	Session	Presenter
3.45pm–5.00pm	Session 9A: Tax Consolidation Myth: Tax consolidation is just for large corporate groups; it doesn't impact my client base... Do you assume you don't need to know about tax consolidation because it just affects large corporate groups? In the new era of companies holding assets to manage Division 7A, access to lower company tax rates and differential tax treatment of capital for companies, it is now more important than ever to understand how tax consolidation gives your clients the tax outcomes they need from effective corporate group planning. This case study session will help you understand: <ul style="list-style-type: none"> – The complex interaction between the different capital gains tax rollovers and concessions and the tax consolidation outcomes – How you can position your client to access the appropriate rollovers to achieve the preferred tax consolidation outcomes – How to set your client up to acquire or sell a company tax effectively where an asset deal is more expensive and still achieve preferred tax outcomes – The factors which will go into a consolidation choice, whether and when to consolidate and how to manage adverse outcomes – The impact on losses and how to maximise their use in a consolidation environment. 	Simon How, CTA KPMG (This group-based discussion session is limited to 80 participants)
OR	Session 9B: Employment Taxes We will give you a brief update on what you need to know about the state of play with employment taxes, followed by a couple of topical case studies. Specifically: <ul style="list-style-type: none"> – Single Touch Payroll – live from 1 July 2018 but many employers received deferrals until at least 1 April 2019. An update on how employers are managing the transition – Superannuation – the government's announced super amnesty, a chance for employers to get things right, and what to do when things go wrong (with the ATO) – Payroll Tax Audits – essential tips and tricks when notified of an audit – Fringe Benefits Tax (and case studies) – Navigating the ATO ruling on travel; TR 2017/D6, what it all means for LAFHA, business travel and general deductibility. Managing the FBT exemption on utes and the ATO's guidelines, and the ATO's position on the minor benefits exemption. 	Ben Turner, CTA EY (This group-based discussion session is limited to 40 participants)
5.00pm–6.15pm	Free time	
6.15pm–7.00pm	Pre-dinner drinks proudly supported by Novotel Barossa Valley Resort	
7.00pm	Join us for the Tax Safari Themed Dinner in the Shiraz Ballroom, proudly supported by Macks Advisory	

Day 3 – Saturday 4 May 2019

Time	Session	Presenter
9.00am–9.45am	Session 10: FY2020 and beyond: taxing emerging technologies When the vast majority of Australia's current tax provisions were drafted, the boom in cryptocurrency and the mobilisation of personal labour and assets in the form of "sharing economies" had not occurred. Consequently taxpayer gains and losses derived through those emerging technologies are being taxed according to traditional taxation principles, leading to some unexpected outcomes. In this session we will consider the current state of play with regard to: <ul style="list-style-type: none"> — Preparing returns for clients with cryptocurrency gains or losses — Initial Coin Offerings — Source of income principles — Sharing economies — International comparisons. 	Will Fennell Piper Alderman
9.45am–10.00am	Business Alliance Partners acknowledgements and prize draw	Nicole Peterson, CTA PKF Adelaide
10.00am–10.45am	Session 11: Panel workshop: What's brewing in Division 7A? Division 7A is an area of tax law which significantly impacts private group clients. Reforms to the Division 7A regime have been discussed and debated over the last few years, however these discussions are coming to fruition with significant changes to the Division 7A regime now on the horizon. The proposed changes throw up significant issues which will require careful consideration and client engagement. How tax advisors manage and navigate the 'evolved' Division 7A regime will be vitally important. This panel session is aimed at providing a practical assessment of the proposed changes to the Division 7A regime focusing on the following: <ul style="list-style-type: none"> — The new 'simplified' loan rules under the 10-year loan model — The transitional rules impacting historic loan balances — Changes to Unpaid Present Entitlements — New safe harbour mechanism — Other technical amendments — Tips and traps. 	Panel Adrian Zuccarini Australian Tax Office Harry Patsias, CTA Wallmans Neil Oakes, CTA Perks
10.45am–11.00am	Convention close	Sean van der Linden, CTA SA State Council Chair The Tax Institute

Lead the way in tax

There is no time like the present to join Australia's premier tax body and take advantage of the special new member introductory offer.

For an additional \$340 on the member registration fee you will receive membership until June 2020.

Member benefits include:

- *Taxation in Australia* journal
- *TaxVine* e-newsletter
- CPD event discounts
- Publications and tax product discounts
- Business Alliance Partner discounts.

Become a member

See registration form for details.



Presenter profiles

Professor Robert Breunig is the Director of the Tax and Transfer Policy Institute at the Crawford School of Public Policy. From 2015 to 2016 he was the Director of the Crawford School of Public Policy. Professor Robert Breunig is one of Australia's leading Public Policy Economists. He has published in over 50 international academic journals in economics and public policy. Professor Breunig has made significant policy impact through a number of his research projects: the relationship between child care and women's labour supply; the effect of immigration to Australia on the labour market prospects of Australians; the effect of switching to cash from food stamps in the U.S. food stamp program and the inter-generational transmission of disadvantage. Professor Breunig's research is motivated by important social policy issues and debates. His work is characterized by careful empirical study and appropriate use of statistical technique.

Timothy Clifton, FTI, is a Chartered Accountant and Registered Liquidator with over 26 years' insolvency experience across a broad spectrum of industries. Tim has extensive experience in appointments, particularly in the manufacturing, construction, hospitality and retail sectors. He has prepared many reports on the financial position of businesses and provided advice to directors. Tim is well versed on managing and selling businesses as well as investigating and pursuing recoveries on behalf of creditors.

Graeme Cooper, FTI, is Professor of Taxation Law at the University of New South Wales and a consultant to Greenwoods & Herbert Smith Freehills. He is a former Chair of the New South Wales State Council of The Tax Institute and former member of the National Council. He has worked as a consultant to the ATO, Treasury, Board of Taxation, United Nations, OECD, World Bank, the International Monetary Fund and several foreign governments. He was admitted to legal practice in New South Wales and Victoria, and practised commercial law and tax in Sydney before entering teaching. He has taught in law schools

in Australia, Europe and the United States, and holds degrees from the University of Sydney, University of Illinois and Columbia University, New York.

Will Fennell is a Partner at Piper Alderman who specialises in income tax, GST and stamp duties. Will leads the Adelaide tax practice but also collaborates nationally with colleagues in his firm's Melbourne, Sydney and Brisbane offices. Will has had significant experience with the taxation of emerging technologies including working on a number of "initial coin offerings". Will has a Master of Tax from Melbourne University.

Simon Haines, FTI, is an Assistant Commissioner in the ATO's Tax Counsel Network. He has more than 18 years of experience in taxation, including periods in the ATO, Treasury, and private practice. Simon currently specialises in income tax issues affecting private business structures, the R&D incentive, and not-for-profits.

Toni Harrington is a Senior Manager in the Private Clients Group of PwC Adelaide. Toni has over 20 years' experience in providing practical accounting and taxation advice to all manner of small and medium to large privately owned businesses along with wealthy individuals. Invariably these privately owned groups include Trusts, for which, in addition to the annual compliance aspects of dealing with a variety of Trust structures, Toni has assisted clients in ATO reviews and disputes, specifically focussed on Trust losses, Family Trust Elections, Trust Net Income calculations, Trust minutes and the like.

Simon How, CTA, is a Director in Corporate Tax at KPMG with over 20 years' experience in advising a wide range of clients through KPMG and previously at the ATO. He has a particular interest in private group tax issues, international transactions, M&A and property related tax issues.

Briony Hutchens, CTA, is a Director in DW Fox Tucker's specialist Tax team, acting on behalf of a wide range of clients on matters ranging from

one-off, large and complex matters to those encountered on a daily basis. She advises on most areas of state and federal taxes including business structuring issues; state taxes, including stamp duty, land tax and payroll tax; taxation disputes (state and federal); trusts; self-managed superannuation funds; property and joint venture projects; estate and succession planning and all aspects of commercial transactions. Briony is a Chartered Tax Adviser and has recently been awarded a Master of Taxation with Excellence. She is recognised in Best Lawyers Australia for her expertise in trusts and estates and wealth management and succession planning.

Alistair Hutson, CTA, is a Partner in the Corporate Tax Group of PwC in Adelaide. He provides taxation advice and support for corporate clients across areas such as mergers and acquisitions, tax due diligence, capital gains tax, cross-border transactions, international tax structuring, funding decisions and repatriation of profits. Alistair is a member of The Tax Institute's SA State Council and speaks regularly for professional bodies in relation to tax.

Paul Ingram, CTA, is a Partner at Minter Ellison and practises in all areas of taxation law, with a particular focus on CGT, business structures, GST and stamp duty. Paul is a member of the Institute's SA Technical Resource Committee, and represents that committee on RevenueSA's SA State Taxes Liaison Group. He is also a member of the Institute's national Not-for-profit Technical Committee as well as the Taxation Committee of the Law Council of Australia.

Neil Oakes, CTA, is a Tax Director at Perks Chartered Accountants and holds a Masters Degree in Tax Law from UNSW (Atax). Neil currently heads up the Technical Tax Consulting division within Perks. He specialises in providing commercially focused tax advice to a wide range of small, medium and large businesses. Neil's areas of specialisation include Division 7A, corporate restructuring and small business CGT concessions.

Harry Patsias, CTA, is a Partner at Wallmans Lawyers providing specialist tax, superannuation and commercial advice. His areas of expertise include federal and state taxes, superannuation compliance and commercial and trust law. Harry is experienced in managing and resolving contentious issues with federal and state taxation authorities, including pre-audit risk reviews and taxpayer representation during comprehensive reviews, audits, mediation of taxation disputes and appeals.

Peter Slegers, CTA heads Cowell Clarke's tax and revenue practice group. Peter advises and acts for a wide range of public and private companies as well as for the trustees of self managed superannuation funds. Peter's areas of expertise include: income tax (as it impacts on business and high net worth clients); capital gains tax; goods and services tax; state taxes and superannuation law. Peter also does succession planning work and is involved in significant business restructures. Peter is regularly involved in advising SMSF trustees on issues associated with superannuation income streams and is a co-author of the SMSF Income Stream Guide. Peter has a master's degree in taxation from the University of NSW – ATAX School. Peter is also a member of the Australian Institute of Company Directors and the SMSF Professionals Association of Australia Ltd. Peter is a member of the Tax Institute's South Australian State Council.

Paul Tanti, CTA, is a partner in the Thomson Geer Tax Section and has a broad range of experience in providing specialist taxation and commercial advice to a wide variety of clients. His broad base of clients includes legal and accounting firms, private and listed companies, high net worth individuals, and private equity funds. Paul advises on all areas of Federal and State taxation law and related commercial matters. Paul is a regular speaker on tax and related commercial matters for various professional bodies. He is a member of The Tax Institute, a member of the Law Council of Australia's Business Law Committee (South Australian Tax Sub Committee), and a member of the South Australian State Taxes Liaison Group.

Ben Turner, FTI, is a Senior Manager in EY's People Advisory Services team. Ben is a Chartered Accountant with over 12 years' experience specialising in taxation issues including expatriate taxation, Fringe Benefits Tax, superannuation/social security and payroll tax. Ben works closely with major organisations, particularly in the Human Resources and Finance areas to address remuneration and tax issues affecting the workforce. This includes designing effective processes, systems and tools to maximise planning opportunities and manage risks particularly with globally mobile workforces.

Nick Wilkins, CTA, is a Partner at Edwards Marshall and has over 25 years' experience in the provision of taxation, accounting and business services with his areas of specialty including CGT, deceased estates and SMEs.

Adrian Zuccarini is a Director at the ATO within Tax Counsel Network. He provides technical advice and guidance on complex technical issues arising within the Private Groups and High Wealth Individuals and Public Group and International areas. Adrian has over ten years' experience within the ATO. Prior to working in Tax Counsel Network Adrian has worked in the Private Groups and High Wealth Individuals area, with a focus on issues affecting professional firms.

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Venue and accommodation



Novotel Barossa Valley Resort 42 Pioneer Avenue Rowland Flat Barossa Valley

The Novotel Barossa Valley Resort is located in the Barossa Valley district, set in a natural amphitheatre overlooking Jacob's Creek. The guest rooms all feature private balconies and views of the Barossa Ranges. Both comfort and functionality are assured with iPod docking stations, connecting directly to 32-inch LCD TVs, pay TV channels, in-house movies, comfortable workstations, including ergonomic chairs and broadband access, a large chaise lounge to stretch out on and individually controlled air-conditioning.

Accommodation has been reserved for delegates only at the Novotel Barossa Valley Resort. Favourable room rates have been negotiated and room rates are quoted on a per-person, per-night basis (inclusive of GST) and include breakfast. These rates are only available through The Tax Institute and exclude hotel incidentals. These favourable room rates have been extended for those wishing to stay on for the weekend after the convention.

All accommodation bookings must be paid in full with registration. In line with the booking conditions at the Novotel Barossa Valley Resort, all accommodation nights booked will be non-refundable in the case of cancellation. All additional hotel incidentals remain the responsibility of delegates. Check-in time is from 2.00pm and check out by 11.00am.

For alternative accommodation arrangements, please contact the Barossa Wine and Tourism Association on 1300 852 982 or visit the website www.barossa.com.

Getting to the Novotel Barossa Valley Resort

The resort is located at 42 Pioneer Avenue, Rowland Flat Barossa Valley. It is 85 kilometres (75-minute drive) from the Adelaide CBD and Adelaide Airport. The venue provides free on-site parking for guests. Car hire is readily available at Adelaide Airport and we encourage you to book when registering for this event.



Optional social activities



Thursday 2 May 2019

SA Tax Institute "Tour de Tax" bike ride

Participate in an organised 72-kilometre group bike ride from Adelaide (leaving Victoria Square at 11.30am) to the Novotel Barossa Valley Resort (Rowland Flat) via Gorge Road and a stop at Cudlee Creek (or for a shorter ride, join the peloton at Cudlee Creek.). Arrival at the resort is timed for 3.30pm at the latest, well ahead of the 5.00pm convention start. Please indicate your interest on the registration form.



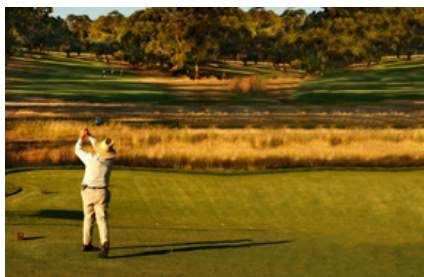
Friday 3 May 2019 afternoon

Endota Spa

Immerse yourself in down-to-earth pampering at the Novotel Barossa Valley Resort's own Endota Spa. Offering unparalleled relaxation, indulge in a range of spa experiences for your body, face, soul and mind, just a stone's throw away from your room. Bookings in advance on 08 8524 0071 or barossavalley@endota.com.au are recommended to avoid disappointment.

Golf at the Tanunda Pines Clubhouse

Two-minute stroll from the resort. This world-class golf course is a stunning 18-hole, par-72 course with 100-year-old gum trees lining fairways that undulate across the hilltops of the Barossa Ranges. It is available either pre, during or post-convention. Contact the club direct on 08 8563 1200 to make your individual or group booking, with golf clubs and motorised golf carts available for hire. Bookings in advance are recommended to avoid any disappointment.



The Tasting Room

For those that are unable to go out and visit one of the 170 wineries in the Barossa, we bring the Barossa to you! Every evening between 5-6pm, The Tasting Room offers complimentary wine tasting featuring a different winery each night. A wide range of wonderful Barossa products are also available for purchase at any time.



**For further information regarding this event, please
contact the SA Team on 08 8463 9444
or email sa@taxinstitute.com.au**

**For registration enquiries, please contact
eventregistrations@taxinstitute.com.au**





Event information

Registration options and inclusions

	Online access to presentations and technical papers	Refreshments during convention hours	Thursday Stand-up Dinner and Friday Safari Themed Dinner	How to register
Full convention registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓	Register online or complete the form included in this brochure.

*Additional tickets to the accompanying persons tickets can be purchased on the registration form.

 **Register online at** taxinstitute.com.au/barossa2019

Discounts

Advance registration

All registrations received and paid for on or before Friday 15 February 2019 will be entitled to the advance registration rate.

Early bird registration

All registrations received and paid for in full by Friday 22 March 2019 will be entitled to the early bird rate.

Group discounts

Purchase four registrations and receive the fifth free.

All attendees must be from the same firm and all must register at the same time. This offer is only valid for registrations received before the close of the early bird offer and cannot be redeemed in conjunction with any other offer, promotional code or discount. Registration fees do not include travel, accommodation or hotel incidentals.

Mates rates

Introduce and register a colleague who has not previously attended the Barossa Convention and we will extend to you the special rate of \$1,335 (normally \$1,585) – a saving of \$250! This offer is only valid for registrations received before the close of the early bird offer, and both registrations must be received together (one registration must be a first-time attendee). This offer cannot be redeemed in conjunction with any other offer, promotional code or discount.

The Tax Institute CPD app

The registration fee includes electronic access for delegates to download all available presenter materials and event information prior to the event. The 2019 Barossa Convention Event App will contain session and presenter information, event materials, sponsor offers and other relevant event information. Email notification will be sent to all registrants in the weeks prior to the convention.

Delegate materials

For an additional fee of \$150, you may opt to receive all available materials on a USB. If you wish to purchase the USB, please complete the relevant section on the registration form. Note that no materials will be available for purchase at the event.

CPD accreditation

Attendance at the convention counts for 11 hours Continuing Professional Development Accreditation with The Tax Institute.

Business Alliance Partners

Our Business Alliance Partners will be on hand throughout the conference and we invite you to discover how their various products and services can be of benefit. For your chance to win one of many exciting prizes, ensure you drop your business card at registration which will be drawn during the Saturday morning sessions.

Dress code

Business casual attire is suitable for the duration of the convention program. For Friday's Tax Safari Dinner, themed or smart dinner attire is appropriate.

Wi-Fi

Internet access will be available for convention delegates using a dedicated access code, provided to delegates on registration. Wi-Fi is accessible in the function foyer and conference rooms from 2.00pm Thursday 2 May to 11.00am Saturday 4 May 2019.

Alteration and cancellation policy (including changing or transferring sessions)

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. It is a condition of acceptance of registration that an administration fee of 20% of the registration fee will be charged for cancellation by delegates. Cancellations must be received in writing by The Tax Institute at least five working days prior to the event. No refund will be given for cancellations received within five working days of the event; however, 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. All accommodation booked through The Tax Institute will be non-refundable in the case of cancellation. The Tax Institute reserves the right to alter any part of the program at any time without notice.



THE TAX INSTITUTE

2019 Barossa Convention Registration form

2019 Barossa Convention

5190501 | 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

Full conference registration

Please see page 12 for registration inclusions.

	Member	New member*	Non-member
Advance registration Received on or before 15 February 2019	<input type="checkbox"/> \$1,485	<input type="checkbox"/> \$1,825	<input type="checkbox"/> \$1,905
Early bird registration Received on or before 22 March 2019	<input type="checkbox"/> \$1,585	<input type="checkbox"/> \$1,925	<input type="checkbox"/> \$2,005
Standard registration Received after 22 March 2019	<input type="checkbox"/> \$1,685	<input type="checkbox"/> \$2,025	<input type="checkbox"/> \$2,105
<input type="checkbox"/> Mates rate promotion – \$1,335 (see page 12 for further information) Name of new attendee:			

☐ I acknowledge that I will receive electronic access to the available papers and presentations through The Tax Institute CPD app.

☐ USB including technical papers and PowerPoints – add \$150 (refer 'Delegate materials' on page 12).

Dietary requirements:

Promotional code:

*EVENT AND MEMBERSHIP OFFER

There is no better time than right now for non-members to take up membership! Register at the Member rate + add on \$340 for Membership and receive member benefits through to 30 June 2020. All new members are eligible to 'upgrade' their membership level at no additional cost by providing the appropriate documentation when applying within the initial membership subscription period.

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character and agree to be bound by the Constitution of The Tax Institute. Further information available at taxinstitute.com.au

Signature:

Date of signature:

DD/MM/YYYY

2 Delegate contact details If your member details are up-to-date, you can skip this section

Member no.: _____

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 purposes.

3 Concurrent session selection

Friday 3 May 2019, 3.45pm–5.00pm

Please indicate your preference: ☐ Session 9A ☐ Session 9B ☐ No, I will not be attending a concurrent session

4 Conventions dinners

The Thursday Stand-up Dinner and Friday Safari Dinner are BOTH INCLUDED in the registration fee for delegates.

☐ Yes, I WILL be attending the BOTH convention dinners

I WILL be at the convention dinner on Thursday 3 May 2019 ☐ Yes ☐ No

I WILL be at the convention dinner on Friday 4 May 2019 ☐ Yes ☐ No

Accompanying person tickets*

☐ Yes, I require additional tickets for accompanying person. No. x tickets at \$400 each: \$

*Accompanying persons (non-delegates) registration includes all morning and afternoon teas, lunch on Friday and dinner on Thursday and Friday evenings. Please supply names of attendees and any dietary requirements as a separate attachment.

5 Optional activities selection

SA Tax Institute "Tour de Tax" bike ride – Thursday 2 May 2019 (11.30am–3.30pm)

This activity is INCLUDED in the delegate registration fee.

- ☐ Yes, I wish to participate in the organised 72-kilometre bike ride from Adelaide to the Novotel Barossa Valley Resort
- ☐ Yes, please contact me to arrange luggage transportation to the convention venue (*additional costs may apply*)

6 Accommodation

Accommodation rates are quoted per person, per night. Bookings are subject to availability, with a limited number of rooms available in each category. Please note rooms will need to accommodate the maximum number of delegates (e.g. apartments accommodate three people). All accommodation booked through the Institute is non-refundable.

- ☐ No accommodation required – own arrangements (move on to "Payment details summary")
- ☐ Studio Suite with 1 king single bed – \$235 per person (single occupancy)
- ☐ Studio Spa Suite with 1 king single bed – \$310 per person (single occupancy)
- ☐ Apartment with 1 room including a double bed and 1 room with 2 single beds – \$420 total, \$140 per person (based on 3-person occupancy)

Arrival date: Departure date: Total number of people in room:

Sharing room with:

Accommodation special requirements (e.g. cot, extra bed etc.):

Please note that additional charges may be incurred for extra guests, extra beds, use of cots etc., which will be charged to the individual room. Accounts are required to be settled by delegates on departure. All accommodation booked through The Tax Institute is non-refundable

7 Payment summary

Registration fee

\$

Accompanying person (add \$400 per person)

\$

USB including technical papers and PowerPoints (add \$150*)

\$

Accommodation

\$

Total payable

\$

For event enquiries, please contact
the Emma Collins on 08 8463 9444 or
emmacollins@taxinstitute.com.au.

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

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

8 Payment method

☐ 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

Membership and education program promotion

- ☐ I am interested in becoming a member of The Tax Institute.
Please send me further details.
- ☐ I am interested in learning more about The Tax Institute's education program.
Please contact me.

Marketing and business alliance partner exclusions

- ☐ I no longer wish to provide my contact details to The Tax Institute's contracted business partners.
- ☐ I no longer wish to receive marketing correspondence from The Tax Institute.

We take your privacy seriously, and our policy can be viewed at taxinstitute.com.au/go/footer/privacy.

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. TTI collects, uses, holds and discloses your personal information (including sensitive information, such as health information) for a range of purposes, such as administrative purposes relating to membership of TTI and TTI's courses (including assessment of eligibility and providing courses), compliance with Government and statutory requirements, provision of information relating to TTI's services and member benefits and to conduct market research. If you do not provide the personal information requested by TTI, it may not be able to provide its services to you, such as assessment of your course enrolment application. TTI does not disclose criminal record information to third parties. TTI usually discloses your personal information to entities such as your sponsoring employer (with respect to your course records and results), The Tax Practitioners Board, TTI's business partners for marketing purposes, IT companies and other companies who provide administrative and other services to TTI and government bodies, such as the Tertiary Education and Quality Standards Agency. TTI may disclose personal information to overseas recipients in countries such as the United States of America and India. For further information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. The Privacy Policy also contains information on how to request access to or correction of your personal information and how to make a complaint about a breach of privacy. By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties as set out in this notice and in accordance with TTI's Privacy Policy. If you do not want your personal information to be used by TTI or disclosed to third parties, for the purpose of direct marketing, please contact us in writing at membership@taxinstitute.com.au.

TO REGISTER

- Online taxinstitute.com.au/barossa2019
- ✉ Mail GPO Box 1694 Sydney, NSW 2001

- @ Email eventregistrations@taxinstitute.com.au
- ☎ Fax 02 8223 0077

Stay and play in the world famous Barossa Valley

The name 'Barossa' is synonymous with great wine, from bold Shiraz to delicate Riesling. There are numbers of unique and wonderful wine experiences to tick off your list in the Barossa, limited only by your time constraints. From hot-air ballooning to cycling and wildlife spotting, the Barossa has a wide range of other experiences to enjoy too.

Also in perfect partnership with its premium wines, the Barossa serves up a smorgasbord of delicious treats, including smoked meats, artisan cheeses, traditional baked goods and much more. Look out for award-winning wine lists paired with extraordinary dining experiences that celebrate the region's produce. Those on a short timeframe can pack the best wine and foodie delights into a day's exploration with the Barossa Butcher, Baker, Winemaker trail.

Follow on to see more highlights or visit www.barossa.com for more information.

Experience some Barossa adventure

With a broad range of cycling options for road or mountain bike enthusiasts, as well as those who want to tour the Barossa at a slower pace, The Jack Bobidge Track offers an idyllic cycling/walking link between Gawler and Tanunda, winding through vineyards and villages. Or why not take to the sky and enjoy a bird's-eye view of the glorious patchwork of vineyards and villages below with an early morning hot air balloon ride with Barossa Valley Ballooning or Balloon Adventures.

Soak up some history

With a strong Lutheran heritage, the Barossa is home to more than 20 historic churches, whose spires mark the spiritual centres of the community. The lovingly preserved churches and historic cemeteries dotted throughout the region all have their own stories.

Art lovers

Wander through the sculpture park at Mengler Hill Lookout, spend time in the Barossa Regional Gallery, browse the work of local and visiting artists and perhaps select something to take home. You'll find plenty of private galleries dotted across the region. At Jam Factory at Seppeltsfield, you can watch local artisans at work and purchase their creations in the nearby gallery shop.

Barossa Vintage Festival, 24–28 April 2019

Why not head to the Barossa prior to the Convention and soak up the celebration of the region's wine, food, culture and heritage at the historic Barossa Vintage Festival. This event is South Australia's largest regional festival where you can be immersed in food and wine experiences against the backdrop of Barossan history and heritage. Visit www.barossavintagefestival.com.au for more information.





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