



THE TAX INSTITUTE



# 34<sup>th</sup> National Convention

13–15 March 2019 | Hotel Grand Chancellor Hobart

---

15 CPD hours

# Welcome

The Tax Institute is proud to present the program for the 34th National Convention to you.

Brexit. President Trump. The Banking Royal Commission. A leadership spill, a new Prime Minister. The world is changing at an increasingly rapid rate, and often in unpredictable ways. If you're not looking forward you're going to be left behind. Taxation administration and practice continues to evolve and many expect it to feature prominently in the 2019 election. With all this happening in the background, the 34th National Convention program has been designed with one eye on the horizon, and both feet planted firmly on the ground.

Over three days in Hobart, the profession will come together to dive into the practical issues facing us today, and hear from those shaping the local and global tax landscape of tomorrow. The Convention Organising Committee has brought together a diverse range of high-profile, expert presenters from across the profession

to deliver the same top-quality technical sessions that have become a hallmark of our National Conventions.

Key sessions throughout the Convention look at how practitioners have been working with recent changes in tax law and policy, with presenters from the ATO offering their perspectives and providing guidance on their interpretation in the keynote sessions, and the Commissioner's address. Closing out the Convention is Ali Noroozi, who will provide his parting comments and observations on the role of the Inspector General of Tax and the broader tax landscape in Australia.

As with every year, delegates can expect outstanding technical and practical content, delivered around a range of top quality activities where they will have the opportunity to network with like-minded professionals, in a relaxed setting.



*Tracey Rens*

**Tracey Rens, CTA**  
2018 President



*Tim Neilson*

**Tim Neilson, CTA**  
2018 Vice President



*Stuart Glasgow*

**Stuart Glasgow, CTA**  
Program Committee Chair





## Experience Hobart

Hobart offers a contrasting blend of heritage, scenery and culture, with world class activities and attractions nearby. Nestled amongst the foothills of Mt Wellington, Hobart combines heritage charm with a modern lifestyle in a setting of exceptional beauty. We have included a number of suggested social options and accompanying person activities for your consideration so that you can make the most of our host destination. We encourage you to stay a few extra days with the family and explore Tasmania and all that it has to offer.

## Who should attend?

- Taxation specialists across all sectors (public, private, NFP)
- Accountants working for or advising SMEs or corporates
- Newcomers to the profession who are wanting to learn and grow their networks
- Business leaders, owners, directors and consultants with an interest in tax
- Anyone with an interest in the latest tax issues impacting businesses locally and globally

## Why attend?

<i>Learn</i>	Up to 15 CPD hours on offer
<i>Discover</i>	Hear from the latest thought leaders in tax
<i>Honour</i>	Recognise your peers at the Tax Adviser of the Year Awards
<i>Network</i>	Three dedicated functions form part of the convention
<i>Relax</i>	Take a break and enjoy a pre or post-convention tour in beautiful Hobart

## Early bird offer

*Register before Friday, 1 February 2019 to save!*

Proudly supported by:



# Day 1

## Technical program

Wednesday, 13 March 2019

Time	Session
12.00–1.00pm	Registration
1.00–1.15pm	<b>Welcome and Opening Address</b> Speaker: Tim Neilson, CTA, 2018 Vice President, The Tax Institute
1.15–2.00pm	<b>Session 1: Justice Graham Hill Memorial Lecture – In Defence of the Income Tax</b> Speaker: Challis Professor Richard Vann, CTA, University of Sydney This session will cover what the real strengths and weaknesses of the income tax are and how it compares to other taxes, with applications in the areas of individuals, legal entities, and small and large businesses.
2.00–3.00pm	<b>Session 2: Residency</b> Speakers: Premila Roe, CTA, BHP Billiton; Denise Honey, CTA, Pitcher Partners; Dr Julianne Jaques, CTA, Victorian Bar The concept of “residence” underpins much of the cross-border operation of Australia’s tax system. In recent times long-standing ideas about corporate residence have been challenged. Our expert panel will discuss the current state of play on corporate residence from a large corporate and SME/private client perspective and how taxpayers and advisers are managing this crucial area.
3.00–3.30pm	Afternoon tea
3.30–4.30pm	<b>Session 3: Interview with the Second Commissioner and Deputy Commissioner</b> Speaker: Andrew Mills, CTA (Life), Australian Taxation Office; Deborah Jenkins, CTA, Australian Taxation Office Facilitator: Professor Dale Pinto, CTA (Life), Curtin University In this interview-style Q&A session, Professor Dale Pinto talks with Second Commissioner Andrew Mills and Deputy Commissioner Deborah Jenkins on some of the hot issues relevant to all tax professionals.
4.30–5.15pm	<b>Session 4: Special Guest Speaker</b> Speaker: Mitch McPherson, SPEAK UP! Stay ChatTY Few people have the drive and dedication of Mitch McPherson. When his younger brother Ty took his own life in 2013, Mitch, a glazier by trade, turned the devastating loss into the successful suicide prevention charity SPEAK UP! Stay ChatTY. Since then Mitch has been dedicated to spreading the message that nothing is so bad that you can’t talk about it.
5.30–7.30pm	Welcome reception – The Lounge by Frogmore Creek, Hobart
7.30pm onwards	Optional social activities

# Day 2

## Technical program

Thursday, 14 March 2019

Time	Session
8:30–9:00am	<b>Senior Tax Counsel Insights</b> Speaker: Professor Robert (Bob) Deutsch, CTA, The Tax Institute
9.00–10.00am	<b>Session 5: Commissioner's Address</b> Speaker: Chris Jordan, AO, CTA, Commissioner of Taxation
10.00–10.30am	<b>Morning tea</b>

Time	SME stream	Corporate stream	Hot topics stream
10.30–11.30am	<b>Session 6/1: Taking the CGT Path Less Travelled</b> Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers This session will review many of the lesser known CGT events which can have significant practical impact if they are ignored or overlooked in the context of transactions. Included are: <ul style="list-style-type: none"> <li>— CGT event K6 on the sale of pre-CGT shares in a company</li> <li>— Identifying whether Division 149 has been triggered</li> <li>— Dealing with CGT event E4 issues in relation to unit trusts.</li> <li>— CGT event K3 passing assets to exempt entities or foreign residents</li> <li>— CGT event J4 which may occur when a trust fails to vest after applying roll-over under Subdivision 124-N</li> <li>— Winding up a company when it has net liabilities – what is meant by this?</li> </ul>	<b>Session 6/2: The Law Changes Associated with the New Approach to Stapled Structures</b> Speakers: James Beeston, Australian Taxation Office; Kirsten Arblaster, PwC; Kelly Heezen, AMP Capital On 27 March 2018, the federal government announced significant reforms to the taxation of stapled structures in Australia as well as the taxation of foreign inbound investors into Australia. The outcome of the changes is to significantly limit the tax concessions previously available to many foreign investors. This panel session will provide insights into these changes and an opportunity to ask questions of speakers of different backgrounds who will cover: <ul style="list-style-type: none"> <li>— An overview of the key legislative changes (announced and enacted)</li> <li>— Practical issues that will arise in applying the changes</li> <li>— The extent to which stapled structures will be used going forward, and what structures are being seen in practice since the changes have been announced.</li> </ul>	<b>Session 6/3: What's Hot in State Taxes</b> Speaker: Leah Ranie, King & Wood Mallesons State taxes can be costly and apply in a number of unanticipated areas in a variety of transactions where parties are not even aware that duty or other taxes are payable. This session will cover: <ul style="list-style-type: none"> <li>— Current issues in stamp duty</li> <li>— What's new in payroll tax</li> <li>— Where we are at with land tax.</li> </ul>

# Day 2

## Technical program

Thursday, 14 March 2019 continued

Time	SME stream	Corporate stream	Hot topics stream
11.30am–12.30pm	<p><b>Session 7/1: Super Reporting – What is in and What is out?</b></p> <p>Speaker: Shirley Schaefer, BDO</p> <p>The implementation of the Transfer Balance Cap Regime has not been the last of the super changes over the past 18 months. Since 1 July 2017 we have seen proposed changes to auditor reporting, non-arms length income (and expenses) and a SG Amnesty. This is on top of the new reporting requirements for Transfer Balance Accounts – annual or quarterly?</p> <p>This session will look at where SMSFs and superannuation have landed since 1 July 2017 and in particular how any reporting obligations have changed, either by legislation or influence of case law.</p>	<p><b>Session 7/2: Challenges with the ATO's Evolving Approach to Information Gathering</b></p> <p>Speakers: Fiona Knight, CTA, Australian Taxation Office; Angelina Lagana, CTA, KPMG Law</p> <p>In connection with the increasing number of ATO risk reviews and audits and tighter timeframes for the ATO to gather information, the Commissioner of Taxation is increasingly using his broad information.</p> <p>Companies are increasingly relying on technology, and the collaborative sharing of information (particularly across various jurisdictions), and this may cause uncertainty for taxpayers about what information is within their custody and control, and what steps they need to take to gather information and satisfy their obligations in responding to ATO requests for information and formal notices.</p> <p>This session will focus on:</p> <ul style="list-style-type: none"> <li>– The Commissioner's use of his formal powers (including penalties and evidentiary sanctions);</li> <li>– Challenges with formal onshore and offshore notices;</li> <li>– Issues and challenges encountered by taxpayers in respond to requests for information and notices – including the challenges associated with global databases, cloud-based document repositories and dual role employees; and</li> <li>– Effective information gathering techniques and the obligation to make reasonable enquiries to determine what is in a taxpayer's custody and control.</li> </ul>	<p><b>Session 7/3: Black Economy Measures – They Don't Affect Your Clients Right...?</b></p> <p>Speaker: Paul Banister, CTA, Grant Thornton</p> <p>Since responding to the Black Economy Taskforce's report in May 2018, the Government has been extremely active with implementation of promised measures. The myriad of announcements, consultations, exposure drafts, Bills and new law has provided much to absorb. In the effort to disrupt the Black Economy, these measures, along with others affecting management of tax compliance obligations, herald the most significant change in tax compliance in a generation. This tax evolution, or is it revolution, shines a light on our client's operations in a different way. In this session, you will learn:</p> <ul style="list-style-type: none"> <li>– What tax measures are already in place and what is to come</li> <li>– How they impact much more than the black economy</li> <li>– What other measures are affecting clients commercially</li> <li>– How the black economy measures fit alongside other recent and proposed reforms to modernise the conduct of business and administration of the tax and transfer system</li> <li>– Surviving and thriving in this new regime.</li> </ul>
12.30–1.30pm	Lunch		

# Day 2

## Technical program

Thursday, 14 March 2019 continued

Time	SME stream	Corporate stream	Hot topics stream
1.30–3.00pm	<p><b>Session 8/1: Testamentary Trusts and Taxes</b>  <b>Speaker:</b> Dung Lam, CTA, Argyle Lawyers</p> <p>A testamentary trust in various forms is a common tool used to meet estate planning objectives. In recent times, testamentary trusts have had a resurgence in popularity due to the transfer balance cap rules causing more superannuation death benefits to be paid out of superannuation on the death of a member. This session examines:</p> <ul style="list-style-type: none"> <li>– Difficult current and perennial tax issues which practitioners may come across when dealing with estates and testamentary trusts</li> <li>– The taxation of capital gains as against the trustee</li> <li>– Less common aspects of the testamentary trust exceptions in Div 6AA</li> <li>– The impact of the May 2018 Federal Budget announcement of an integrity measure for Div 6AA – was it at all needed?</li> <li>– Trust splitting in the estate context in light of the draft Taxation Determination 2018/D3. Can the death rollover assist?</li> <li>– Foreign beneficiaries and their impact on a testamentary trust – tax wise.</li> </ul>	<p><b>Session 8/2: Australia's Responses to the BEPS OECD Project – What is the Reality?</b>  <b>Speaker:</b> Matt Popham, CTA, KPMG</p> <p>Recent years have seen an unprecedented global, coordinated response to the 15 Action Items recommended by the OECD following its Base Erosion and Profit Shifting project, a process in which Australia (and the ATO) has been at the leading edge.</p> <p>This practical session will peer through the fog of these legislative and administrative developments and reforms to focus on the practicalities of Australia's response to various BEPS-related initiatives, focusing on practical examples where the DPT, MAAL, MLI and anti-hybrid rules can apply to Australian taxpayers.</p> <p>The session will also briefly cover some of the mechanisms available to the ATO under domestic tax law to implement the BEPS initiatives.</p>	<p><b>Session 8/3: Tax and Technology: Automation, the Digital Economy and Single Touch Payroll</b>  <b>Speakers:</b> Robyn Jacobson, CTA, TaxBanter; Colin Walker, Australian Taxation Office</p> <p>In the ever-changing world of tax and technology, we are constantly facing pressures around efficiencies and doing things smarter. But what does this mean for our practices? What are some of the current practical issues with regard to technology, what demands and challenges does this pose and what is the impact on our clients ... now and in the future? Specifically, this interactive session will cover:</p> <ul style="list-style-type: none"> <li>– The current state of play with tax and technology</li> <li>– What is changing with regard to electronically dealing with the ATO?</li> <li>– The practical realities of Single Touch Payroll and making it work in practice — including small employers becoming subject to STP reporting from 1 July 2019, and tailored solutions for micro employers and closely held employers</li> <li>– Automation — what we have now compared to what we may have in the future.</li> </ul>
3.00–3.30pm	Afternoon tea		

*“Three streams of technical content with a practical spin and views from industry and regulators will make this event one you just cannot miss.”*

Stuart Glasgow, CTA, Program Committee Chair



# Day 2

## Technical program

Thursday, 14 March 2019 continued

Time	SME stream	Corporate stream	Hot topics stream
3.30–4.30pm	<p><b>Session 9/1: Division 7A and UPEs – The Road Ahead</b>  <b>Speaker:</b> Chris Wookey, CTA, Deloitte Private</p> <p>In October 2018, Treasury published a Consultation Paper outlining the elements of a proposed new regime for Division 7A.</p> <p>Proposed amendments to Division 7A have a long history commencing with the Board of Taxation's "Post-Implementation Review of Division 7A" first announced in May 2012.</p> <p>The report was followed by announcements of targeted reforms in the Federal Budgets in 2016 and 2018 as part of the "Ten Year Enterprise Tax Plan".</p> <p>This session will consider the road ahead including:</p> <ul style="list-style-type: none"> <li>– 1 July 2019 proposed reforms</li> <li>– Pre-Div 7A UPEs and loans – a change of direction?</li> <li>– Current best practice and</li> <li>– Current issues and threats.</li> </ul>	<p><b>Session 9/2: Application of the MLI</b>  <b>Speaker:</b> Graeme Cooper, FTI, University of Sydney</p> <p>The Multilateral Instrument (MLI) is the new acronym on the block. This is a novel approach to updating many of the 3,000 or so existing double tax treaties on a fast-track basis. The MLI is expected to start to reshape international tax from 2019, and Australia is likely to be part of the first wave of countries whose treaties will be affected. This session is intended to give you an overview of the MLI, and also looks at the MLI from an Australian perspective. The session will cover:</p> <ul style="list-style-type: none"> <li>– What is the MLI?</li> <li>– Understanding covered tax agreements, reservations and notifications</li> <li>– The relationship between the MLI and bilateral tax treaties</li> <li>– Expected timelines</li> <li>– Australia's approach to the MLI</li> <li>– How will existing Australian double tax treaties be impacted?</li> <li>– What are the expected Australian impacts on inbound and outbound flows?</li> </ul>	<p><b>Session 9/3: Where Are We With GST and Where Could We Be Going?</b>  <b>Speaker:</b> Geoff Mann, CTA, Ashurst</p> <p>With recent and ongoing developments in the indirect tax space, this session will aim to highlight:</p> <ul style="list-style-type: none"> <li>– Proposed and recently implemented legislative changes</li> <li>– The release of new GST rulings and cases</li> <li>– Areas of ATO focus.</li> </ul> <p>This practical session will enable attendees to walk away with an understanding of current issues and how these will impact their practice over the coming year.</p>





# Day 2 Technical program

Thursday, 14 March 2019 continued

Time	SME stream	Corporate stream	Hot topics stream
4.30–5.30pm	<p><b>Session 10/1: A Taxing Journey Home</b>  <b>Speaker:</b> Gil Levy, CTA (Life), Gilsons Chartered Accountants</p> <p>Australian residents can find themselves entitled to offshore funds for many reasons. This session will outline the tax issues arising and what you should do about them in a range of examples, including:</p> <ul style="list-style-type: none"> <li>— Becoming a trustee of a foreign deceased estate</li> <li>— Receiving a distribution from a foreign deceased estate</li> <li>— Becoming a beneficiary or new controller of a foreign trust</li> <li>— Receiving a distribution from a foreign trust</li> <li>— Withdrawing funds entitlements from foreign pension schemes.</li> </ul>	<p><b>Session 10/2: Transfer Pricing Update</b>  <b>Speaker:</b> Cam Smith, Deloitte</p> <p>With the ATO's focus on related party financing shifting to business as usual, intangibles are increasingly becoming the transfer pricing priority of both multinationals and the ATO.</p> <p>This session will cover upcoming transfer pricing issues in the areas of identification, classification and evaluation of intangibles.</p>	<p><b>Session 10/3: Fraud and Evasion</b>  <b>Speaker:</b> David W Marks, QC, CTA, Queensland Bar</p> <p>The policy of the law is that taxpayers with simple tax affairs should be able to treat their tax affairs as closed after two years, and four years otherwise. Outside those limitation periods, the Commissioner may only amend an assessment if he has formed the opinion that there was "fraud or evasion".</p> <p>There is anecdotal evidence that the Commissioner is becoming more inclined to form the opinion that there was fraud or evasion allowing him to amend taxpayers' assessments outside of the review period. This greatly raises the stakes for taxpayers under audit, as the general interest charge on prior years will significantly increase the total liability. This session will examine:</p> <ul style="list-style-type: none"> <li>— The elements of "fraud or evasion"</li> <li>— The taxpayer's options when the Commissioner has formed such an opinion</li> <li>— What the decided cases have said.</li> </ul>
5.30–7.00pm	Free time		
7.00pm onwards	Tax Adviser of the Year Awards ceremony and convention gala dinner Hotel Grand Chancellor Hobart		



# Day 3 Technical program

Friday, 15 March 2019

Time	Session		
8.30–9.30am	Session 11: Exclusive VIP address by The Hon. Stuart Robert MP		
Time	SME stream	Corporate stream	Hot topics stream
9.30–10.30am	<p><b>Session 12/1: Restructuring Tricks and Traps</b> Speakers: Megan Bishop, EY; Simon Webster, Australian Taxation Office</p> <p>The restructuring of client affairs often has hidden pitfalls, particularly with clients involved in professional practices. This session will consider:</p> <ul style="list-style-type: none"><li>— Satisfying the ultimate economic ownership requirement when discretionary trusts are part of the group</li><li>— Alienation of professional practice income (as distinct from statutory PSI)</li><li>— Personal services/exertion (inalienable) vs business income (alienable)</li><li>— ATO risk assessment guidelines and the allocation of profits within professional firms.</li></ul>	<p><b>Session 12/2: Debt/Equity and Thin Capitalisation – Surprising Consequences for Unsurprising Transactions</b> Speaker: Michael Bona, CTA, PwC; Tariq Rasool, PwC</p> <p>In a post-<i>Chevron</i>, post-hybrids, post-BEPS world, it's easy to overlook the more traditional potholes that can undo an otherwise straight-forward (re)financing transaction. This session provides an update on the latest developments and trends of unsurprising (re)financing transactions leading to surprising consequences in the realms of debt/equity, thin capitalisation, value shifting, dividend access shares, debt-to-equity swaps, loss utilisation, franking and more.</p>	<p><b>Session: 12/3: Recent Cases</b> Speaker: Clare Thompson, ATI, Frances Burt Chambers</p> <p>This session will highlight the significant federal tax case law which has been determined by the High Court, Supreme Court, Administrative Appeals Tribunal and Federal Court in Australia in 2018.</p>
10.30–10.45am	Morning tea		
10.45–11.45am	<p><b>Session 13/1: CGT Small Business Concessions</b> Speaker: Michael Parker, CTA, Hall &amp; Wilcox</p> <p>The CGT small business concessions have become a key element in planning for small business clients, and while most clients know that the concessions may be available, it is our role as advisers to ensure the correct application of the concessions. This session will cover:</p> <ul style="list-style-type: none"><li>— What do the recent law changes mean for access to the concessions?</li><li>— Should we be reconsidering structures in light of those changes?</li><li>— What recommendations have come out of the Board of Taxation review into small business tax concessions and how will these impact the CGT small business concessions?</li></ul>	<p><b>Session 13/2: US Tax Law Reform</b> Speaker: Scott Hes, EY</p> <p>On 22 December 2017, the most significant reforms to the US tax code since the 1980s were enacted. The legislative drafting process was fast-tracked and there was little consultation with commerce or professional bodies, which has created significant uncertainty in relation to this significant law change. This session will provide an overview of:</p> <ul style="list-style-type: none"><li>— The key legislative changes</li><li>— The potential impact (including traps and opportunities) these changes represent for inbound and outbound investors</li><li>— The remaining key areas of uncertainty.</li></ul>	<p><b>Session 13/3: Elder Practice – King Lear and the Baby Boomers Last Stand</b> Speaker: Tim Tierney, Tierney Law</p> <p>As the average population age and diminished capacity increase, so to does the sensitivity to and incidence of elder abuse. What role do the legal and accounting professions play? This session will examine the following:</p> <ul style="list-style-type: none"><li>— What does “capable” mean?</li><li>— What are the capacity related obligations of practitioners?</li><li>— What are the limits and nature of the Attorney’s role?</li><li>— How do you future proof aging clients and their affairs?</li><li>— How do you respond to Directors and Trustees experiencing declining capacity?</li><li>— When do you recommend corporate vs individual trustees?</li></ul>

# Day 3

## Technical program

Friday, 15 March 2019 continued

Time	Session
11.45am–12.45pm	<p><b>Session 14/1: When a Dealing Between Members of the Family is Not in the Course of the Family Dealing</b> Speaker: Michael Butler, CTA, Finlaysons</p> <p>The potential threat of the application of the section 100A “reimbursement agreement” provisions looms over many transactions for SME taxpayers using trusts.</p> <p>In the original NTLG request for agenda items submitted in 2013, a number of ATO alerts, determinations and rulings, where section 100A had been identified by the ATO as having potential application, were listed. Since the publication of the resulting fact sheet in 2014, that list has only grown and yet taxpayers have continued to have little clarity around the key exclusion from the provisions being those transactions that have been “entered into in the course of an ordinary family or commercial dealing”. The ATO is now intending to provide further clarity on this exclusion.</p> <p>This session will consider the situations when the ATO may consider that a dealing between members of the family is not in the course of the family dealing through the exploration of case studies.</p>
	<p><b>Session 14/2: Sleeping Giants and Silent Killers – Changes to the Accounting Standards and the Omnipresence of Tax-Effect Accounting</b> Speakers: Tracey Rens, CTA, Deloitte; Melanie Earl, Deloitte</p> <p>This session will explore the practical impacts of the changes to the Accounting Standards as well as common challenges and opportunities presented by tax-effect accounting. In particular, the session will address:</p> <ul style="list-style-type: none"><li>– The revenue recognition standard (AASB/IFRS 15) – retrospective vs transitional applications</li><li>– The leasing standard – implications for lessees on financing, thin capitalisation and much more</li><li>– Increased focus on reconciliation of accounting results – a core pillar of justified trust and experiences with ATO streamlined assurance reviews</li><li>– Voluntary Tax Transparency Code – future trends and the increasing importance of a reliable effective tax rate</li><li>– Tax reporting in general purpose financial statements for SGEs</li><li>– Update on old favourites – recent “war stories” on the importance of accounting for frankable distributions, share capital tainting, debt forgiveness, TFAs and more.</li></ul>
	<p><b>Session 14/3: When Does Tax Advice Become Legal Advice Which Contravenes State or Territory Law?</b> Speaker: John Morgan, CTA, Victorian Bar</p> <p>With accountants and lawyers practising in tax, it can be easy to forget that there are State and Territory laws, regulating lawyers, and specifying things that unregulated people can’t do. This ‘blind spot’ is partly because Federal law permits registered tax agents and BAS agents to do various things, and this law (if constitutional) overrides State and Territory laws. This session will examine the issues involved in this overlooked area and the consequences of getting this wrong (which includes criminal prosecution, return of fees, and putting professional indemnity insurance and professional accreditation at risk). These issues will be more than theoretical, if they threaten the business model of affected practices.</p>
12.45–2.00pm	<p><b>Session 15: Seated lunch and closing keynote presentation</b> Speaker: Ali Noroozi, Former Inspector-General of Taxation</p>

## Join the conversation

 [facebook.com/thetaxinstitute](https://facebook.com/thetaxinstitute)

 [twitter.com/taxinstituteoz](https://twitter.com/taxinstituteoz)

 [linkedin.com/company/the-tax-institute](https://linkedin.com/company/the-tax-institute)

 [blog.taxinstitute.com.au](https://blog.taxinstitute.com.au)



# Presenter profiles

**Kirsten Arblaster**, is a corporate tax advisor at PwC and leads the Infrastructure and Urban Renewal Tax Group in Australia. Since 1996 she has been advising domestic and foreign investors on tax aspects of their business, specialising in the infrastructure and property sectors. Kirsten holds a Masters of Law and a Bachelor of Economics (with Hons.) from Monash University. She is admitted to practice in Victoria.

**Paul Banister, CTA**, is a Chartered Accountant and a Partner at Grant Thornton, leading their tax division in Brisbane. He has over 30 years' experience working with clients to help them navigate through complex and potentially risky tax and commercial issues. His expertise includes domestic and international tax planning, transaction advisory and support, superannuation structuring and advice, succession planning and estate planning. Paul has presented at many professional and business forums, both in Australia and internationally and was the recipient of The Tax Institute's SME Tax Adviser of the Year Award for 2016.

**James Beeston** is an Assistant Commissioner with the ATO. James works in the ATO's Case Leadership area where he manages complex issues relating to large corporate businesses. James is also the leader of the ATO's Infrastructure Project Team and the stapled groups cluster that oversees all major infrastructure transactions, including privatisations. He is currently involved in the implementation of the new stapled groups measure introduced in parliament October 2018.

**Megan Bishop** is a Senior Manager and legal practitioner in the EY Melbourne Tax Controversy Practice. She has experience in risk management and mitigation strategies including private rulings, voluntary disclosures, risk reviews, alternative dispute resolution, and Federal and State tax litigation including in the High Court, Federal Court, AAT, Supreme Court and VCAT. Particular areas of expertise include private groups and individuals.

**Michael Bona, CTA**, is a corporate tax adviser at PwC and leads the Global Tax Practice (international tax and transfer pricing) in Australia. Since 1998 he has been advising Australian and foreign multinational companies on the tax aspects of their businesses, specialising in cross-border transactions, financing and M&A in the resources sector. Michael holds a Bachelor of Laws (with Hons) from the University of Queensland and Masters of Laws from the University of Melbourne. He is admitted to practise in Queensland, Victoria and Western Australia.

**Michael Butler, CTA**, is the Partner in Charge of the Finlaysons Tax & Revenue Group. Michael advises domestic and foreign clients on federal, international and state tax matters, and has a special interest in mining and property taxation, corporate restructurings, cross-border investment, trusts, and estate and succession planning. Michael is a past Chair of The Tax Institute's SA State Council, a regular contributor to Institute events, and is currently learning Mandarin.

**Graeme Cooper, FTI**, is Professor of Taxation Law at the University of Sydney and a consultant to Greenwoods & Herbert Smith Freehills. He is a former Chair of the The Tax Institute's NSW State Council and its 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.

**Professor Robert (Bob) Deutsch, CTA**, is Senior Tax Counsel at The Tax Institute. Bob was previously Deputy President of the Administrative Appeals Tribunal (AAT), and for over 20 years he was a Professor in Taxation Law with the University of New South Wales. Bob specialises in taxation matters, with a special emphasis on international tax, and his time with the

AAT has required extensive involvement in corporate law, social security and immigration matters. He also has experience as a solicitor with a major national law firm, as an independent Barrister, and as a director with a major accounting firm.

**Melanie Earl**, is a Director in the Business Tax Advisory team at Deloitte. Melanie has worked for Deloitte Sydney and Deloitte London and has over 16 years of corporate and international tax experience with a focus on M&A and large multinational groups. Melanie has coordinated and worked on a number of transactions in the Australian, Asia-Pacific and European markets.

**Kelly Heezen**, joined AMP Capital in 2008 as Senior Tax Counsel and has advised the business throughout an unprecedented period of growth. Kelly has extensive experience in advising on all aspects of the investment cycle, including multi-billion-dollar international fund builds, structuring of acquisitions and divestments, fundraising, asset recycling, recapitalisations and refinancing. Kelly is regularly engaged in consultation on law design and administration with Treasury and the ATO. Prior to AMP Capital, Kelly practised corporate and international tax in the big-4 in Melbourne, Sydney and London.

**Scott Hes** is a director EY's International Tax Services practice. Scott is currently based in Sydney and is part of the US Tax Desk for the Asia-Pacific region. Prior to joining the US Tax Desk, Scott worked in Chicago, New York and Munich, advising on both third-party and internal transactions. Scott has experience providing broad-based tax planning advice to US and non-US based multinational corporations in a range of industries, and in planning and evaluating international tax strategies both in a US inbound and US outbound context. He also has experience serving private equity and corporate clients on domestic and cross-border M&A related transactions, including buy-side and sell-side due diligence, structuring and integration.

**Denise Honey, CTA**, is an International Tax Partner/ Executive Director with Pitcher Partners. She has many years of experience providing tax and structuring advice



## Presenter profiles continued

to corporate and trust groups and their key stakeholders. Denise also helps such taxpayers deal with internationally focused ATO reviews. Denise is an Accredited Tax Law Specialist with the Law Institute of Victoria, a member of the Treasury BEPS Tax Advisory Group, a member of The Tax Institute's Corporate and International Tax Committee and a regular presenter at the Institute's events.

**Robyn Jacobson, CTA**, is well known in tax training circles, having been a professional tax trainer for 22 years and a regular conference presenter. With more than 25 years in the profession, Robyn has a public practice background in tax consulting and compliance, audit, superannuation and litigation support. Her tax training roles include 5 years with Webb Martin, then as sole director of her own business, Cyntax, before its merger with TaxBanter in 2011. Based in Melbourne, Robyn continues to be a highly regarded tax trainer, providing training through TaxBanter. Robyn is a Chartered Tax Adviser, Fellow of both Chartered Accountants Australia and New Zealand and CPA Australia, and a Registered Tax Agent. She is a member of The Tax Institute's Victorian Professional Development Committee, Co-Chair of The Tax Institute's Victorian Women In Tax Committee, and Chair of CPA Australia's Victorian Public Practice Committee. Robyn regularly consults with The Treasury, the ATO and the professional bodies on technical issues, and has been involved in ATO consultations on Single Touch Payroll for 3 years. Robyn is also an avid advocate, blog writer, podcaster and social media commentator. Robyn is a Chartered Tax Adviser, Fellow of both Chartered Accountants Australia and New Zealand and CPA Australia, and a Registered Tax Agent. She is a member of The Tax Institute's Victorian Professional Development Committee, Co-Chair of The Tax Institute's Victorian Women In Tax Committee, and Chair of CPA Australia's Victorian Public Practice Committee. Robyn regularly consults with The Treasury, the ATO and the professional bodies on technical issues, and has been involved in ATO consultations on Single Touch Payroll for 3 years. Robyn is also an avid advocate, blog writer, podcaster and social media commentator.

**Dr Julianne Jaques, CTA**, is a barrister specialising in taxation law. She appears regularly in Melbourne and Sydney and has particular expertise in disputes involving complex commercial transactions. Prior to coming to the Bar, Julianne spent 10 years in private practice with a major law firm and a major accounting firm. She is a Chartered Tax Adviser and a Chartered Accountant, and her doctoral thesis at the University of Melbourne was on the taxation of corporates. Julianne is a member of the Tax Practitioners Board and the Board of Taxation.

**Deborah Jenkins, CTA**, is Deputy Commissioner, Small Business at the ATO. She and her team work in partnership with tax practitioners, business, industry bodies and other organisations to create an environment that supports sustainable and viable small business to thrive through reducing complexity and increasing the adoption of digital technology. Prior to joining the ATO, Deborah was a partner at an advisory firm where she advised domestic and international clients across all industries on GST related matters. She started her tax career as a graduate in New Zealand's Inland Revenue, working in transfer pricing. A passionate and dedicated professional, Deborah has previously been named as one of the International Tax Review Leaders for Australia.

**Chris Jordan, AO, CTA**, was appointed Commissioner of Taxation at the ATO from 1 January 2013. He has extensive tax experience in public and private sector roles and has been an adviser to both sides of government on tax policy and implementation issues. Chris was New South Wales Chairman of KPMG until his retirement in 2012 and has previously held the roles of Chairman of the Board of Taxation and the Business Tax Working Group, Chairman of the Committee for Sydney and Board Member of the Bell Shakespeare Company and the Sydney Children's Hospital Foundation. Chris is a Chartered Tax Adviser with The Tax Institute and a Fellow of the Chartered Accountants Australia and New Zealand. He has a Master of Laws (Sydney) and Bachelors of Commerce and Law (UNSW).

**Angelina Lagana, CTA**, is a Tax Dispute Resolution and Controversy Partner in KPMG Law and has over 18 years' experience specialising in tax controversy and dispute resolution. Angelina has represented high wealth individuals, corporations and multinationals subject to ATO reviews and audits. Angelina assists and advises her clients throughout all stages of an ATO inquiry, from early ATO engagements, risk reviews, audits, objections, alternative dispute resolution and litigation. Angelina has experience in acting as instructing solicitor in large-scale litigation in the Federal Court and Administrative Appeals Tribunal, both on behalf of large corporates and private clients, and on the behalf of the Commissioner of Taxation. Angelina's expertise includes the early assessment of evidence, audit strategy, and proactively engaging with the ATO, leading to satisfactory resolution of tax disputes at the earliest opportunity.

**Dung Lam, CTA**, is a Tax Team Leader at Argyle Lawyers with more than 20 years' experience in advising on a wide variety of taxes, including income tax, capital gains tax, GST and state taxes such as duty, payroll tax and land tax. Dung also has extensive experience advising on taxation trusts, superannuation issues in the SMSF arena and tax issues related to estate planning. Dung advises a broad range of clients ranging from corporates, small-to-medium enterprises, high net worth individuals, professional firms, accountants, financial planners and their clients. Dung regularly speaks for a range of professional organisations and accounting discussion groups, and is a published author on the foreign resident capital gains tax withholding and the transfer balance cap.

**Gil Levy, CTA (Life)** is the Principal of Gilsons Chartered Accountants and Chartered Tax Advisers. With over 40 years' experience in tax consulting he specialises in providing advice to both clients and other practitioners in the SME segment, particularly on the CGT issues associated with mergers and acquisitions. In recent years his practice has an increasing focus on the taxation issues of business expanding overseas and expatriates returning home. Gil is

## Presenter profiles continued

a past President of The Tax Institute and the Asia Oceania Tax Consultants Association. He is also a member of the International Tax Specialists Group.

**Geoff Mann, CTA**, is a Partner in the Tax team at Ashurst. He advises on indirect tax, with particular emphasis on GST, stamp duty, land tax and human resources taxes. Geoff has over 25 years' experience. Geoff's broad practice enables him to consult in relation to overall tax management strategies and review programs, as well as due diligence exercises and dispute resolution.

**David W Marks, QC, CTA**, is a commercial Silk at the Queensland Bar practising principally in tax. He has a broader practice in commercial litigation, trusts and estates, and administrative law. He contributes to the life of the profession through his committee work for The Tax Institute and other professional bodies. He is a Chartered Tax Adviser and a registered Trust and Estates Practitioner. He received The Tax Institute's Meritorious Service Award in 2013.

**Mitch McPherson** started the successful suicide prevention charity SPEAK UP! Stay ChatTY when his younger brother Ty took his own life in 2013. Since 2014 Mitch has partnered with Relationships Australia Tasmania, to ensure that the message of SPEAK UP! Stay ChatTY continues to grow. Mitch's vision is that SPEAK UP! Stay ChatTY will become a national charity, with a focus on delivering programs in schools and sporting clubs around Australia to increase awareness and remove the stigma surrounding mental health.

**Andrew Mills, CTA (Life)**, has overall responsibility for the ATO's law practice, including law interpretation, dispute resolution and the ATO's role in policy and law design. Andrew has more than 30 years of experience in taxation, including periods in the ATO, commerce and the tax profession. Andrew was a Director at Greenwoods & Freehills for more than 20 years and managing director of the firm from 2006 to 2011. Andrew was President of The Tax Institute in 2006–2007, is a former Governor of the Taxation Research Foundation and also represented industry

bodies across a number of sectors. He holds a Bachelor of Business, a Master of Laws and a Graduate Diploma in Tax Law. Andrew is a Chartered Taxation Adviser (Life) of The Tax Institute, a member of the International Fiscal Association and a graduate of the Australian Institute of Company Directors.

**John Morgan, CTA**, has practiced primarily in revenue and superannuation law since coming to the Victorian Bar in 2004, and for many years prior to that, whilst practising as a partner in the antecedents of Hebert Smith Freehills (2000–2003); Ashurst (1997–2000) and DLA Piper (1989–1997). John also taught tax at Monash University. John also served, in 1998, on the Tax Law Improvement Project, which was charged with re-writing the income tax law into the new Act in Plain English. And, in 2008, the then Assistant Treasurer appointed John to serve as a private sector representative on the Tax Design Review Panel, charged with finding a better process for designing and implementing tax.

**Ali Noroozi** was appointed as the Inspector-General of Taxation (IGT) for an initial term of five years on 6 November 2008. On 6 November 2013, he was re-appointed to the role for a further term of five years. Mr Noroozi holds degrees in Engineering and Law, including a Masters of Law specialising in taxation. Prior to his appointment as the IGT, he had gained more than 15 years of experience working in taxation, including working at leading international accounting and law firms in Australia and the United Kingdom.

**Michael Parker, CTA**, is a Partner in the taxation section of Hall & Wilcox. His practice focuses on tax disputes, domestic income tax issues including CGT and Division 7A, business sales, acquisitions and restructures and GST. Michael has extensive experience handling a broad range of taxpayer disputes Small Business CGT Concessions. Michael regularly consults to the Board of Taxation and Treasury including in respect of Division 7A, small business impediments and the small business CGT Concessions. He is a regular presenter for The Tax Institute.

**Dale Pinto, CTA (Life)** is currently a Professor of Taxation Law in the Curtin Law School at Curtin University. Dale is the author/co-author of numerous books, refereed articles and national and international conference papers, and is on the editorial board of a number of peer-reviewed journals as well as being the Editor-in-Chief of several refereed journals. Dale is the Chair of the Tax Institute's National Education Quality Assurance Board and is a member of TEQSA's Expert Panel in Accounting and Taxation. Dale served as an inaugural member of the National Tax Practitioners Board and is a current member of the Board of Taxation's Advisory Panel and the ATO's Tax Technical Panel (Superannuation), as well as a number of The Tax Institute's National Technical Committees.

**Matt Popham, CTA**, is a KPMG Tax Partner with almost 25 years tax experience. Matt leads the International Tax Advisory Group at KPMG in Perth and has significant experience in advising multinational groups on the ever-increasing tax complexity and legislative change associated with the BEPS initiatives and cross-border transactions. Matt is a previous chair of The Tax Institute's WA State Council and regularly presents and lectures on international tax and BEPS matters.

**Leah Ranie** is a Partner at King & Wood Mallesons and has developed a preeminent reputation as a market-leader on State tax and GST matters. She regularly advises major Australian and multinational clients on the State tax and GST aspects of mergers and acquisitions and structured real estate and infrastructure transactions. Leah is the go-to stamp duty adviser for a number of Australian based REITs and has also advised clients on multi-billion dollar bids for major infrastructure assets and more recently on a number of greenfields renewables projects.

**Tracey Rens, CTA**, is a Partner in Deloitte Sydney's Business Tax Advisory practice. She has over 20 years experience in providing advice on all major areas of Australian tax, including capital gains tax issues relating to acquisitions, divestments and restructures, loss management

## Presenter profiles continued

and integrity issues, capital allowance provisions, repatriation matters, tax consolidation and IFRS. Tracey is the 2018 President of The Tax Institute.

**Premila Roe, CTA**, of BHP Billiton is currently the Vice President for APAC and EMEA for BHP and she has over 24 years of tax experience. Premila's prior corporate experience was as the Head of Tax at AGL and then Optus. She commenced her career with the ATO and worked in Canberra on the Ralph Review of Business Taxation before leaving to join Deloitte. She has a Bachelor of Laws and a Masters in Tax Law and is a Chartered Tax Adviser.

**Shirley Schaefer** of BDO is an auditor by training and a SMSF expert by choice. She established a separate Superannuation division at BDO in 1996 to offer technical services to clients with SMSFs. Shirley is a regular speaker and author on SMSFs and the 2017 winner of the SMSF Adviser Awards for Specialist SMSF Accountant and the Editors Choice Award. She has also won SMSF Auditor of the Year for the Australian Accounting Awards in 2018 and Auditor of the Year for the Women in Finance Awards in 2018. She is an Accredited Specialist Adviser and Accredited Specialist Auditor of the SMSF Association; a Fellow of the Association of Superannuation Funds Australia; a Fellow of the CAANZ; a Registered SMSF Auditor; and a Registered Company Auditor.

**Cam Smith** is a Partner in Deloitte's Global Transfer Pricing practice, based in Melbourne, with 22 years' transfer pricing and international tax experience working in Australia, Asia, New Zealand and Europe. Cam's experience includes advising on a wide variety of complex transfer pricing matters for some of the world's largest multinational corporations. Cam is recognised in Euromoney's World's Leading Transfer Pricing Advisors and has been a member of Australian Treasury's BEPS Advisory Group.

**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.

**Clare Thompson, ATI**, is a barrister practising from Francis Burt Chambers in Perth. She acts as counsel in a range of fields, primarily commercial property, banking, wills and estates and taxation litigation before the Supreme Court of WA, Federal Court of Australia and the AAT. Clare was President of the Law Society of Western Australia in 2002 and was an inaugural director of Australian Women Lawyers, established in 1997. Clare has sat on various health professional regulators, and is presently a director of APAC which sets standards for psychology education in Australia.

**Tim Tierney** is the Principal of Tierney Law. Tim has a personal practice in commercial, property and elder law. He has represented the Law Society on various committees and liaison groups with government and non-government bodies, including the Australian Property Law Group of the Law Council. Tim was awarded the 2011 Presidents Award by the Law Society for service to the profession. He has delivered training for the Tax Institute, the Real Estate Institute of Tasmania, the University of Tasmania and the Law Society of Tasmania.

**Richard Vann, CTA**, is Challis Professor of Law at the University of Sydney and has taught at Harvard and NYU Law Schools and the Universities of Amsterdam, London and Oxford. Richard has worked in the past at the IMF and OECD and held many government consultancies in Australia and elsewhere. He has been a consultant for specialist tax firm Greenwoods & Herbert Smith Freehills since 1985. Richard specialises in corporate and international taxation on which he has published widely, both in Australia and internationally.

**Colin Walker** joined the Australian Taxation Office in 1975. Until the early nineties he worked in many areas of the ATO with a primary focus on indirect taxes particularly sales tax. After a short period with Ernst and Young as a Senior Manager consulting in Sales Tax he worked for the International Monetary Fund providing in country technical assistance in Tax and Customs Policy and Administration in many overseas developing countries including 3 years in Kyrgyzstan and most of the Pacific Island Countries from 1994 to 2002. In 2002 Colin returned to the Tax Office and as an Assistant Commissioner has worked on the development and implementation of significant business and individual new legislation and is currently responsible for the relationship with tax practitioners in the tax and superannuation system.

**Simon Webster** is the Director of Professional Firms Compliance within the ATO. He is responsible for the management of the professional firm's risk and is a member of the ATO's established Professional Firms Working Group. Simon has a Bachelor of Economics (Accounting), is a Certified Practising Accountant and has worked in the tax field for over 30 years, 21 years within the ATO and over 10 years in private practice.

**Chris Wookey, CTA**, is a principal in the tax consulting division of Deloitte Private. He has over 30 years' experience in the chartered accounting profession and is a member of The Tax Institute's SME & Tax Practitioner Technical Committee and the Victorian State Technical Resource Committee as well as a regular presenter at its events. His experience, centred on issues encountered by private groups, includes advising about the tax treatment of accessing wealth accumulated in various structures such as trusts, superannuation funds and especially companies, in addition to having been involved in the early confidential consultations about the upcoming Div 7A reforms.





## Included networking activities

*Wednesday, 13 March 2019*

### Convention welcome reception

Join us at our stunning welcome reception venue, The Lounge by Frogmore Creek, for drinks, canapes and networking.

**Time:** 5.30–7.30pm

**Price:** Included in the full convention registration fee.  
Additional tickets: \$80 per person

**Dress:** Smart casual

**Venue:** The Lounge by Frogmore Creek  
Walking distance from Hotel Grand Chancellor  
– 3 minutes

*Thursday, 14 March 2019*

### National convention gala dinner and the Tax Adviser of the Year Awards ceremony

The gala dinner is the only national gathering of The Tax Institute's membership. Incorporating the Tax Adviser of the Year Awards ceremony, the event recognises the outstanding achievements of the best tax practitioners in Australia, from rising stars to industry leaders.

**Time:** 7.00pm onwards

**Price:** Included in the full convention registration fee.  
Additional tickets: \$175 per person

**Dress:** Cocktail

**Venue:** Hotel Grand Chancellor



### Tax Adviser of the Year Awards

The awards presented at the Tax Adviser of the Year Awards ceremony include:

- ◆ *Emerging Tax Star* ◆
- ◆ *SME Tax Adviser of the Year* ◆
- ◆ *Corporate Tax Adviser of the Year* ◆
- ◆ *Chartered Tax Adviser of the Year* ◆





## Optional social activities

*Wednesday, 13 March 2019*

### Option 1: Whisky and Gin Tasting

Lark Distillery is one of Australia's leading distilleries, producing high-quality, premium spirits using traditional time-honoured methods. Join your fellow delegates for an exclusive tasting of Lark whiskies and gins.

**Time:** 7.30pm onwards

**Price:** \$45

**Dress:** Smart casual

**Venue:** Lark Distillery

### Option 2: Franklin Restaurant

This is the ultimate in dining in Tasmania. A bar-cum-restaurant in the heart of Hobart's CBD that has been voted number one restaurant in Tasmania and number six in Australia.

**Time:** 7.30pm onwards

**Price:** \$130 incl beverages

**Dress:** Smart casual

**Venue:** Franklin Restaurant

### Option 3: Wine Tasting

Sample some of Tasmania's finest wines and local cuisine at our Welcome Reception venue, The Lounge by Frogmore Creek.

**Time:** 7.30pm onwards

**Price:** \$45

**Dress:** Smart casual

**Venue:** The Lounge by Frogmore Creek

## Accommodation

Conference National has negotiated and accommodation for delegates travelling to Hobart.

Book your trip today by visiting [conferencenational.com.au/34th-national-convention](http://conferencenational.com.au/34th-national-convention)

A sample of some of our host hotel providers are below:

### Hotel Grand Chancellor ★ ★ ★ ★ ★

\$250 per night plus breakfast

### Macq 01 ★ ★ ★ ★ ★

Distance to Hotel Grand Chancellor – 3-minute walk

\$400 per night plus breakfast

### The Old Woolstore ★ ★ ★ ★

Distance to Hotel Grand Chancellor – 4-minute walk

\$236 per night plus breakfast

### Mantra on Collins ★ ★ ★ ★

Distance to Hotel Grand Chancellor – 6-minute walk

\$245 per night plus breakfast

### Quest Savoy ★ ★ ★ ★

Distance to Hotel Grand Chancellor – 8-minute walk

\$229 per night plus breakfast



# Tours and activities

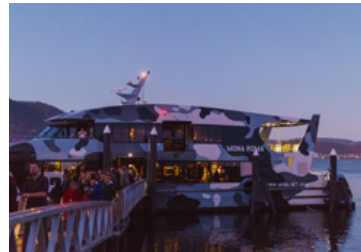
## Suggested accompanying persons' and touring activities



### Bruny Island tour

Bruny Island Cruises is the original and most famous of the Pennicott Wilderness Journeys. You will cruise alongside some of Australia's highest sea cliffs, drift up close to listen to the awesome 'Breathing Rock', enter sea caves, pass through the narrow gap between the coast and 'The Monument', a tall slender stack and feel the power of nature at the point where the Tasman Sea meets the might of the Southern Ocean. Join the enthusiastic and informative crew in the search for the abundant coastal wildlife such as seals, dolphins, migrating whales, birds of prey, albatross and many other varieties of sea birds.

**\$135 per person (3-hour cruise)**



### Boutique Wine Tours – MONA and Wine Experience Tour

Enjoy our personalised full-day tour from Hobart, accompanied by experienced guides. You will sample some of Tasmania's finest cool climate wines in the renowned wine growing region of the Coal River Valley. Enjoy a light vineyard platter at Puddleduck (subject to availability) and after your delicious brunch, journey to the Museum of Old and New Art, MONA. To enhance your MONA experience, you will travel back to Hobart via the MONA Roma ferry.

**\$180 per person**



### Hobart historic walking tour

Join Hobart Historic Tours for Hobart's best walking tour. Explore the sights of Hobart on this guided walk of Hobart's best places to visit on foot. Hobart Historic Tours offers a range of options and is one of the best ways to discover Hobart on a guided tour.

**From \$33 to \$50 per person**



### Cascade Brewery tour

The Cascade Brewery tour steps back through Cascade's proud history then takes you behind the sandstone facade to view the workings of this unique brewery. Here we explain the ingredients and craft behind our beers, finishing with a great tasting experience.

**\$30 per person**

### Extend your stay

There is a range of superb recreational options available for delegates to book via Discover Tasmania, including:

- Battery Point
- Mt Wellington
- Huon Valley
- Port Arthur
- Lake St Clair
- Launceston

**Visit [The Tax Institute website](#) to find out more about pre and post-convention tours today!**

# How to register

## Online:

Register online. Go to [taxinstitute.com.au/nc19](http://taxinstitute.com.au/nc19)

## Email:

[eventregistrations@taxinstitute.com.au](mailto:eventregistrations@taxinstitute.com.au)

## Post:

The Tax Institute  
GPO Box 1694  
Sydney NSW 2001

## Fax:

02 8223 0077

*Don't miss your chance to SAVE  
on your full convention registration!*

### Advance pricing

Register for the full convention on or  
before 7 December 2018 and save  
\$400 off the standard registration price.

Save  
\$400

### Early bird pricing

Register for the full convention on or  
before 1 February 2019 and save  
\$200 off the standard registration price.

Save  
\$200

## Registration options

### A Full convention registration

This registration option includes participation in the full technical program, electronic access to all available materials via The Tax Institute CPD app, attendance at the convention welcome reception and the convention gala dinner. Registration fees do not include travel, accommodation or hotel incidentals.

### B Day registration

This registration option entitles one delegate to attend a full day of technical sessions and electronic access to all available materials via The Tax Institute CPD app.

### C Employer ticket

This registration option allows one registration to be shared between multiple attendees from the same firm. To purchase this ticket type, email [eventregistrations@taxinstitute.com.au](mailto:eventregistrations@taxinstitute.com.au).

**Group discount – 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 cannot be redeemed in conjunction with any other offer, promotional code or discount and excludes single-day registrations.

## Registration inclusion summary

	A Full convention registration	B Day registration	C Employer ticket
Online access to presentations and technical papers	✓	✓	✓
Morning/ afternoon tea	✓	✓	
Convention lunches	✓	✓	
Convention welcome reception and gala dinner*	✓		

\*Additional tickets to the welcome reception and gala dinner can be purchased on the registration form.





# Further information

## Delegate list

A delegate list will be included on the convention app to assist with networking. If you do not wish your name to be included on the listing, please advise the National Events Team when registering.

## Confirmation of registration

On receipt of registration and payment, you will receive an email containing your confirmation letter and tax invoice.

## CPD Accreditation

Full convention attendance counts for 15 hours of structured Continuing Professional Development Accreditation with The Tax Institute. Single-day attendance on Wednesday counts for 4 hours, Thursday, 6.5 hours and Friday, 5.5 hours. Employer ticket attendance will be allocated accordingly to each attendee.

## Hobart weather

In mid-March, average temperatures range from 17 to 21°C. Spring is the wettest time of the year (168.7mm/6.6); however, it should be noted that Hobart is Australia's second-driest capital city (after Adelaide).

## Delegate Travel

The Tax Institute has negotiated discounted accommodation for delegates travelling to the event. Bookings must be made via our dedicated website page.

The rates are for selected room types only and delegates may be able to secure other packages and rates closer to the date of the event with other third party providers. It is suggested that delegates traveling to the event consider the option of travel insurance.

## Getting to the Hotel Grand Chancellor Hobart

By car or taxi: From Hobart Airport, it is approximately 15 minutes travel time.

Flights: Qantas, Virgin Australia and Jetstar operate services to Hobart. Delegates are advised to book early to secure best pricing.

For convenience, visit the website [hobartairport.com.au](http://hobartairport.com.au) for information on getting around Hobart and surrounding areas.

## Transportation to social activities

### Welcome reception

This year the welcome reception will be held offsite at The Lounge by Frogmore Creek, Hobart. The Tax Institute will be on hand to provide you with directions to the venue, a three-minute walk from the Hotel Grand Chancellor.

Those attending an optional social activity on Wednesday evening should refer to National Events team for more information on transportation arrangements for these activities if applicable.

### Gala dinner and the Tax Adviser of the Year Awards ceremony

This year the convention gala dinner will be held at the Conference venue, the Hotel Grand Chancellor.

### Dress code

Business or business casual clothing is suitable for the duration of the convention. For the Gala Dinner, the dress code is cocktail.

### Special dietary requirements

Please indicate any special dietary requirements on your registration form.

## Alteration and cancellation policy

(including changing or transferring session)

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 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.

## New member

The new member registration fee includes the fee for Affiliate level membership of The Tax Institute so that you can take advantage of the many benefits membership affords. Membership is extended until 30 June 2020.

---

For further information regarding this event, please contact the National Events Team on 1300 733 842 or email [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

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



# 34th National Convention

## Registration form

34th National Convention

1190303 | 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

#### A Full convention registration

	Member	New member*	Non-member
<b>Advance registration</b> Received on or before 7 December 2018	<input type="checkbox"/> \$1,695	<input type="checkbox"/> \$2,035	<input type="checkbox"/> \$2,095
<b>Early bird registration</b> Received on or before 1 February 2019	<input type="checkbox"/> \$1,895	<input type="checkbox"/> \$2,235	<input type="checkbox"/> \$2,295
<b>Standard registration</b> Received after 1 February 2019	<input type="checkbox"/> \$2,095	<input type="checkbox"/> \$2,435	<input type="checkbox"/> \$2,495

#### B Flexible registration options

	Member	New member*	Non-member
<b>Wednesday only</b>	<input type="checkbox"/> \$545	<input type="checkbox"/> \$885	<input type="checkbox"/> \$945
<b>Thursday only*</b>	<input type="checkbox"/> \$995	<input type="checkbox"/> \$1,335	<input type="checkbox"/> \$1,395
<b>Friday only</b>	<input type="checkbox"/> \$695	<input type="checkbox"/> \$1,035	<input type="checkbox"/> \$1,115

\* Thursday registration does not include attendance at the convention gala dinner. Tickets to the gala dinner can be purchased separately at a cost of \$175 per person.

#### C Employer ticket ☐ \$2,750

(The Tax Institute will send you an employer registration form to complete with your session selections).

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

#### \*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](http://taxinstitute.com.au)

Signature:

Date of signature:

### 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:

Dietary requirements:

☐ 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 Breakout session selection

#### Thursday, 14 March 2019

10.30–11.30am ☐ S 6/1 ☐ S 6/2 ☐ S 6/3

11.30–12.30pm ☐ S 7/1 ☐ S 7/2 ☐ S 7/3

1.30–3.00pm ☐ S 8/1 ☐ S 8/2 ☐ S 8/3

3.30–4.30pm ☐ S 9/1 ☐ S 9/2 ☐ S 9/3

4.30–5.30pm ☐ S 10/1 ☐ S 10/2 ☐ S 10/3

#### Friday, 15 March 2019

9.30–10.30am ☐ S 12/1 ☐ S 12/2 ☐ S 12/3

10.45–11.45am ☐ S 13/1 ☐ S 13/2 ☐ S 13/3

11.45–12.45pm ☐ S 14/1 ☐ S 14/2 ☐ S 14/3

TO REGISTER

➤ Online [taxinstitute.com.au/nc19](http://taxinstitute.com.au/nc19)

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

✉ Mail GPO Box 1694 Sydney, NSW 2001

## 4 Networking activities

### DAY 1 – WEDNESDAY, 13 MARCH 2019

#### Convention welcome reception

The convention welcome reception on Wednesday, 13 March 2019 is included in the full convention registration fee.

☐ I confirm **I WILL** attend the convention welcome reception **OR** ☐ **I WILL NOT** be in attendance

#### Additional tickets

☐ Yes, I require  x additional ticket/s at \$80 each: \$

#### Wednesday night optional social activities

The evening activities on Wednesday, 13 March 2019 are NOT included in the registration fees. Please indicate whether you will be in attendance at any of the following activities.

##### Option 1: Whisky and Gin Tasting

☐ Yes, I require  x ticket/s at \$45 each: \$

##### Option 2: Franklin Restaurant

☐ Yes, I require  x ticket/s at \$130 each: \$

##### Option 3: Wine Tasting

☐ Yes, I require  x ticket/s at \$45 each: \$

### DAY 2 – THURSDAY, 14 MARCH 2019

#### Gala dinner and Tax Adviser of the Year Awards ceremony

The convention gala dinner on Thursday, 14 March 2019 is included in the full convention registration fee. For catering purposes, please indicate whether you will attend the dinner.

☐ I confirm **I WILL** attend the convention gala dinner **OR** ☐ **I WILL NOT** be in attendance

#### Additional tickets

☐ Yes, I require  x additional guest ticket/s at \$175 each: \$

#### Complete a Table of 10

☐ Yes, I require  x additional guest ticket/s at \$175 each: \$

#### DIETARY REQUIREMENTS

Please advise guest names and dietary requirements as a separate attachment to this booking

## 5 Accommodation

The Tax Institute and ConferenceNational has negotiated special accommodation rates at selected hotels in Hobart for delegates travelling to the Convention.

To book your trip go to [conferencenational.com.au/34th-national-convention](http://conferencenational.com.au/34th-national-convention)

## 6 Payment summary

Convention registration	\$ <input type="text"/>
Additional guest tickets – welcome reception	\$ <input type="text"/>
Additional guest tickets – gala dinner	\$ <input type="text"/>
Optional social activities tickets	\$ <input type="text"/>
<b>Total payable</b>	\$ <input type="text"/>

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

## 7 Payment method

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

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

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

Name on card:

Card no.:

Expiry date:

Cardholder's  
signature:

For our refund, cancellation and replacement policy visit [taxinstitute.com.au/professional-development/event-policy](http://taxinstitute.com.au/professional-development/event-policy)

#### 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](http://taxinstitute.com.au/go/footer/privacy).

**For event enquiries, please contact the National Events team on 1300 733 842 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).**

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

**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 [taxinstitute.com.au](http://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](mailto:membership@taxinstitute.com.au).



“

*I'm very pleased to welcome delegates to Hobart for the National Convention not only for the excellent content but also for the fabulous networking opportunities the convention will offer.”*

Marg Marshall, CTA, Tasmanian National Councillor.

Images featured in this brochure are provided courtesy of the following suppliers:

Page 2 and 3: Tourism Tasmania and Wineglass Bay Cruises. Page 8: Tourism Tasmania (left); Tourism Tasmania and Nick Osborne (centre); Jason Charles Hill (centrefold).  
Page 9: Flow Mountain Bike (centre); Pete Harmsen (right). Pages 16-17 are supplied by host venues: Frogmore Creek; Hotel Grand Chancellor; Lark Distillery; Franklin Restaurant.  
Page 18 (left to right): Tourism Tasmania and Rob Burnett; Lusy Productions; Poon Wai Nang; Tourism Tasmania and Kathryn Leahy. Current page: Brian Dullaghan.





## THE TAX INSTITUTE

Level 10, 175 Pitt Street  
Sydney, NSW 2000

ABN 45 008 392 372

**Tel** 02 8223 0000

**Fax** 02 8223 0077

For information, please contact  
national events team at  
[nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au)

## *Thank you*

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

**Tim Neilson, CTA**, Greenwoods & Herbert Smith Freehills  
(Chair, Convention Organising Committee)

**Stuart Glasgow, CTA**, HID Group

**Len Hertzman, CTA**, Australian Taxation Office

**Marg Marshall, CTA**, WLF Accounting and Advisory

**Tracey Rens, CTA**, Deloitte

And the National Convention Program Committee:

**Stuart Glasgow, CTA**, HID Group  
(Chair, Convention Program Committee)

**Matthew Andruchowycz, CTA**, DMAW Lawyers

**Paul Banister, CTA**, Grant Thornton

**Mathew Chamberlain, CTA**, EY

**Paul Conde, CTA**, Tierney Law

**David Earl, FTI**, PwC

**Leo Efthivoulou, CTA**, ENA Law

**Loreena Gillon, CTA**, Arithmos

**Angelina Lagana, CTA**, KPMG Law

**Marg Marshall, CTA**, WLF Accounting and Advisory

**Peter Nearhos, CTA**, QIC

**Daniel Smedley, CTA**, Sladen Legal

**Judith Taylor, CTA**, King & Wood Mallesons

**Scott Treatt, CTA**, Australian Taxation Office

**Jerome Tse, CTA**, King & Wood Mallesons

**David Williams, CTA**, (Life)

Proudly sponsored by:

