



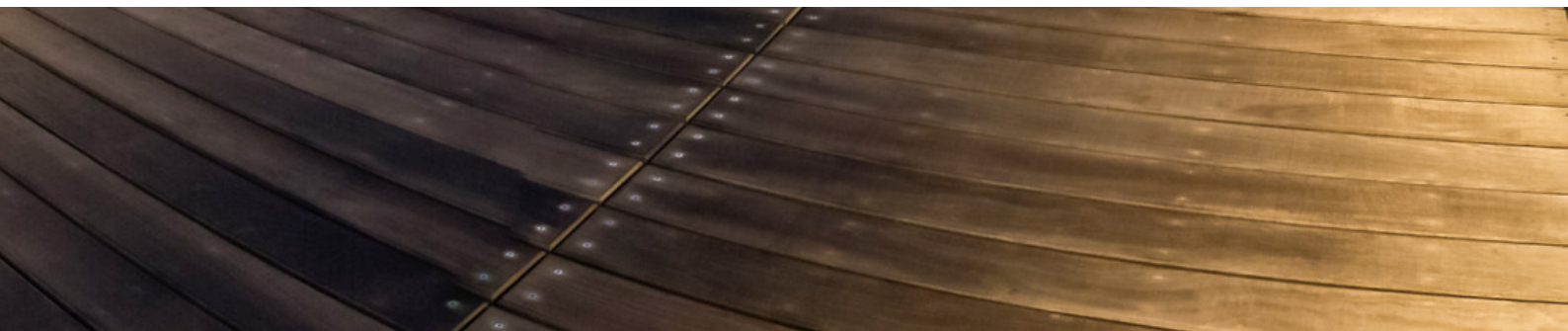
THE TAX INSTITUTE



2018 WA Superannuation Intensive

22–23 March 2018 | City West Receptions

10 CPD hours



Welcome

2018 WA Superannuation Intensive

With the biggest changes to superannuation in ten years now in effect since 1 July 2017, and the fact that the ability to utilise the CGT relief expires in May 2018, The Tax Institute's 1.5 day WA Superannuation Intensive is the LAST CHANCE to have the opportunity to hear from leading industry experts on the latest changes, issues and strategies. The practical program will consider in detail the new reforms and how they impact your clients, areas where you need to ACT NOW, as well as the issues and strategies with respect to superannuation that haven't changed legislatively, but where we need to be aware of the ATO approach and the investment provisions.

The event is a must-attend for all those who have SMSF clients, and has been designed specifically for practitioners in the area of SMSFs such as accountants, auditors, lawyers and financial planners.

Thank you

The Tax Institute gratefully acknowledges the generous assistance of members of the Superannuation Intensive planning committee:

Jemma Sanderson, CTA, Cooper Partners (Chair)

Greg Bentley, CTA, Opulen Accounting and Superannuation

Con Gotsis, CTA, Pascoe Partners Accountants

Josh Haque, Pitcher Partners

Matthew Gurner, PwC

Katie Timms, RSM Australia

Early bird offer

Register on or before Friday 16 February 2018 to save!



Technical program

Event summary

Day 1 – Thursday, 22 March 2018

Time	Session	Presenter
9.00–10.00am	Session 1: CGT Relief Seminar <p>The ability to claim the CGT relief with respect to the new Transfer Balance Cap regime expires at the due date for your clients' 2016/2017 SMSF annual return. For many, that is 15 May 2018. That is 7 weeks from the date of the Superannuation Intensive, and therefore if you haven't considered the issues for your clients, now is the time. In this session, Jemma will consider the eligibility, three different calculation methodologies, operation of the deferral provisions and the relevant disclosures for the relief, all within a case study context.</p>	Jemma Sanderson, CTA Cooper Partners Financial Services
10.00–10.30am	Morning tea	
10.30am–12.30pm	Session 2: Super death benefits and strategy beyond 1 July 2017 <p>This interactive workshop session looks at the 1 July 2017 superannuation reforms and explores the direct and indirect implications of the changes. The session will also explore the issues and strategies professional advisers need to be aware of to put their client in the best position going forward. Topics covered will include:</p> <ul style="list-style-type: none">▪ Death benefit payment options post 1 July 2017▪ Retirement phase income streams, transition to retirement pensions and death benefits▪ Pension payment options and estate planning▪ Insurance in super in a post 1 July 2017 world▪ Estate planning and super contribution strategies▪ Minor beneficiaries, super death benefits and testamentary trusts	Craig Day Colonial First State
12.30–1.15pm	Lunch	
1.15–2.45pm	Session 3: ATO and The Auditor – Working under the new rules <p>This session will be split into two parts with an Auditor's and ATO perspective on the adoption of the new superannuation rules.</p> <p>In the first part of the session Greg Bentley will discuss issues he has seen with the adoption of the new superannuation rules from an audit perspective. This session will cover areas such as the valuation of assets, adoption of tax policies and calculation of exempt pension income and the implementation of CGT relief provisions for investments.</p> <p>The second part of the session will outline the regulatory and income tax compliance framework the ATO has in place to support and encourage trustees in meeting their obligations. Assistance Commissioner Peter Holt will outline approaches in dealing with non-compliance, the outcomes of Tax Office assurance activities, the compliance challenges associated with the implementation of the new superannuation the ATO's reform measures and the impact the new rules will have for practitioners.</p>	Greg Bentley, CTA Opulen Accounting and Superannuation Peter Holt Australian Taxation Office
2.45–3.15pm	Afternoon tea	
3.15–5.15pm	Session 4: How to Navigate the New Contribution Rules <p>While the government has had a strong focus on reducing the amount people can contribute in recent years, there has also been a shift to improve contribution flexibility to cater for a variety of personal circumstances.</p> <p>This contribution workshop will not only assist you to understand the introduction of new concepts such as the total super balance but also highlight how, with careful planning and consideration of the new rules, you can improve individual outcomes especially in the context of the broader superannuation reforms.</p> <p>Join Katie and Josh as they comprehensively guide you through a number of practical examples to give you a fresh perspective on how to navigate the new contribution rules.</p>	Josh Haque Pitcher Partners Katie Timms RSM Australia
5.15–5.45pm	Networking drinks	

Technical program

Event summary

Day 2 – Friday, 23 March 2018

Time	Session	Presenter
9.00–10.30am	Session 5: Investments in SMSFs Masterclass There aren't many restrictions on the types of assets an SMSF can invest in but there is a lot to know about how to transact around assets, particularly where related parties are concerned. Join Liz as she discusses trusts, borrowing arrangements, in-house assets, non-arm's length income and the latest ATO views in these areas.	Liz Westover PwC
10.30–11.00am	Morning tea	
11.00am–1.00pm	Session 6: Pensions Workshop The Transfer Balance Cap or TBC is the latest buzz word to enter our vernacular in the superannuation sphere. It is an area where we need to be thinking about the position for some clients now, but also into the future for others, and planning to ensure that their superannuation is optimised. In this session, Jemma will outline via workshop case studies the strategies, opportunities and issues to consider under the new TBC regime, providing some great ideas to take back to your practices.	Jemma Sanderson, CTA Cooper Partners Financial Services
1.00pm	Close	

Presenter profiles

An overview of our experts

Greg Bentley, CTA, has been working in the area of superannuation for over 19 years for some of Australia's leading superannuation accounting firms. He is the Director of Opulen Accounting and Superannuation, a specialist chartered accounting firm that provides administration, compliance and auditing services to a range of superannuation clients, accounting firms and financial planners. Greg is a SMSF Association Specialist Advisor and Specialist Auditor, Chartered Tax Adviser, Chartered Accountant, a previous winner of the SMSF Association CEO Scholarship Award and a regular speaker on a range of superannuation topics.

Craig Day is the Executive Manager of Colonial First State's technical services team, FirstTech, and has over 19 years' experience in the financial services industry. In his role Craig is responsible for providing specialist technical support to the Commonwealth Bank of Australia's investment, superannuation and advice businesses and to act as a media spokesman for Colonial First State on superannuation and retirement planning issues. Craig regularly presents at industry conferences and professional development events and is actively involved in providing ongoing specialist adviser education.

Josh Haque is Senior Manager Taxation Services at Pitcher Partners in Perth. He has been working in public practice for over 10 years focusing on the taxation issues affecting private clients. He has detailed knowledge of the Self-managed Superannuation Fund sector, helping Trustees to understand and comply with legislative requirements as well as providing daily reporting solutions which assist in the timely management of their retirement savings. He also has experience handling complex SMSF scenarios and has been able to assist Trustees in a number of ATO reviews and investigations.

Peter Holt is the ATO's Assistant Commissioner in Superannuation, Engagement and Assurance. In his role he works closely with the Superannuation industry and leads over 400 officers across the country who administer Superannuation's compliance program. Peter is also the chair of the Superannuation Risk Committee that is responsible for identifying, assessing and ensuring treatment strategies are in place to mitigate superannuation risks arising from client behaviour, administrative design and deficiencies in the law.

Jemma Sanderson, CTA, is a Director of Cooper Partners Financial Services, heading up their SMSF specialist services. She provides strategic advice on SMSFs and estate planning to clients, as well as

technical support to accounting, legal and financial planning groups. Jemma is a sought-after presenter, author and lecturer on SMSFs across Australia, and was recently named as SMSF Adviser of the Year at the 2017 National Women in Finance awards.

Katie Timms is a Director with RSM Australia and has specialised in superannuation since commencing work as an accountant in 2000. She has significant experience in all areas of SMSFs, including administration and compliance, asset acquisition and tax saving strategies, structural assistance and estate planning. Katie provides advice and assistance to Trustees, accountants and financial advisors.

Liz Westover is a Director in the Private Clients Melbourne division of PricewaterhouseCoopers. She is responsible for developing and growing the firm's presence and capabilities in the SMSF market and providing technical support for the firm and its clients in superannuation and related tax matters. She has extensive experience in superannuation, having previously held the position as Head of Superannuation at Chartered Accountants Australia and New Zealand. Liz has been heavily involved in superannuation policy development and advocacy, regularly liaising and consulting with Government, regulators and stakeholders.



THE TAX INSTITUTE

2018 WA Superannuation Intensive Registration form

2018 WA Superannuation Intensive

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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.

Date of issue: December 2017

Registration options

A Full Intensive registration

Registration includes:

- Participation in the full technical program
- 10 structured CPD hours
- Online access to technical papers prior to the intensive through The Tax Institute event CPD app
- Lunch and refreshment breaks on Thursday and refreshment breaks on Friday
- Sundowner Networking Reception on Thursday, 22 March 2018

B Flexible registration options[§]

Thursday only registration includes:

- Participation in full technical program on Thursday
- 6.5 structured CPD hours
- Online access to technical papers prior to the intensive through The Tax Institute CPD event app
- Lunch and refreshment breaks on Thursday

Friday only registration inclusions:

- Participation in full technical program on Friday
- 3.5 structured CPD hours
- Online access to technical papers prior to the intensive through The Tax Institute CPD event app
- Morning tea and refreshments on Friday

C Group discount

[†]\$70 discount applies when 2 attendees from the same firm register for the full event at the same time. Not valid with any other offer.

[‡]20% discount applies when 3 or more attendees from the same firm register for the full event at the same time. Not valid with any other offer.

[§]Please note the networking event is not included in day only registrations, however, tickets can be purchased for \$35 each

Further information

The 2018 Superannuation Intensive CPD Event App

The CPD event app will be accessible for delegates to download all available presenter materials and event information one week prior to the event. The event app will contain session and presenter information, venue and parking information, sponsor offers and any other relevant event information.

Printed materials

Printed materials are not included in your registration. A delegate folder with all available printed materials (technical papers and slides) can be purchased at a cost of \$100. These must be purchased and paid for in conjunction with your registration. Please note there will be no additional folders available for purchase at the event.

Venue and parking

The event will be held at City West Receptions – 45 Plaistowe Mews, West Perth. This venue provides FREE Parking to delegates. A parking permit and map will be made available to delegates a few days prior to the event.

Alteration and cancellation policy

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. No refund will be given for cancellations received within five working days of the convention. 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. Any accommodation nights booked through The Tax Institute will be non-refundable in the event of cancellation

1 Registration

Full registration

Full registration fee includes all refreshment breaks and networking reception.

	Member	New member*	Non-member
Early bird registration (on or before 16 February 2018)	<input type="checkbox"/> \$1025	<input type="checkbox"/> \$1345	<input type="checkbox"/> \$1195
Early bird Group Discount 1 [†] (2 attendees)	<input type="checkbox"/> \$955	<input type="checkbox"/> \$1275	<input type="checkbox"/> \$1125
Early bird Group Discount 2 [‡] (3+ attendees)	<input type="checkbox"/> \$820	<input type="checkbox"/> \$1140	<input type="checkbox"/> \$956
Standard registration (Received after 16 February 2018)	<input type="checkbox"/> \$1125	<input type="checkbox"/> \$1445	<input type="checkbox"/> \$1295
Standard Group Discount 1 [†] (2 attendees)	<input type="checkbox"/> \$1055	<input type="checkbox"/> \$1375	<input type="checkbox"/> \$1225
Standard Group Discount 2 [‡] (3+ attendees)	<input type="checkbox"/> \$900	<input type="checkbox"/> \$1220	<input type="checkbox"/> \$1036

Flexible registration options

	Member	New member*	Non-member
Thursday only	<input type="checkbox"/> \$695	<input type="checkbox"/> \$1015	<input type="checkbox"/> \$795
Friday only	<input type="checkbox"/> \$450	<input type="checkbox"/> \$550	<input type="checkbox"/> \$770

- I acknowledge that I will receive electronic access to the available papers and presentations through The Tax Institute CPD app.
- I would like to purchase a hard copy of the available presentations and technical papers. Please add \$100.

*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 \$320 for Membership and receive member benefits through to 30 June 2018. 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:

Promotional code:

2 Networking reception

The Networking reception is INCLUDED in the full registration fee.

- Yes, I WILL be attending the networking reception OR
 No, I WILL NOT be attending the networking reception

*Please supply names of attendees and any dietary requirements as a separate attachment.

Additional tickets^

- Yes, I require additional tickets for the welcome drinks reception at \$35 per person

No. x tickets at \$35 each: \$

3 Delegate contact details

Member no.: If your member details are up-to-date, you can skip this section.

Title: Mr Mrs Miss Ms Other (please specify) Date of birth:

First name: Last name:

Position: Company:

Address:

Suburb: State: Postcode:

Telephone: Fax:

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.

4 Payment summary

Registration fee \$

Printed delegate folders (add \$100) \$

Additional networking reception tickets (\$35 per person) \$

Total payable \$

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

Replacements

Please note: Registrations for the event are not interchangeable but replacements are acceptable. Please notify us at least two days prior if you intend on sending a replacement. CPD hours will be allocated to the designated attendee. If the replacement is not a member, the non-member registration fee will apply.

Cancellations

The Tax Institute must receive cancellations in writing five working days prior to the conference. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. Further details on The Tax Institute's cancellation policy can be found at taxinstitute.com.au.

5 Payment method

Cheque payable to The Tax Institute (in Australian dollars)

Credit card \$ Card type: AMEX Visa MasterCard Diners Expiry date:

Name on card:

Card no.: Cardholder's signature:

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/

✉ Mail GPO Box 1694 Sydney, NSW 2001

@ Email eventregistrations@taxinstitute.com.au

☎ Fax 02 8223 0077