



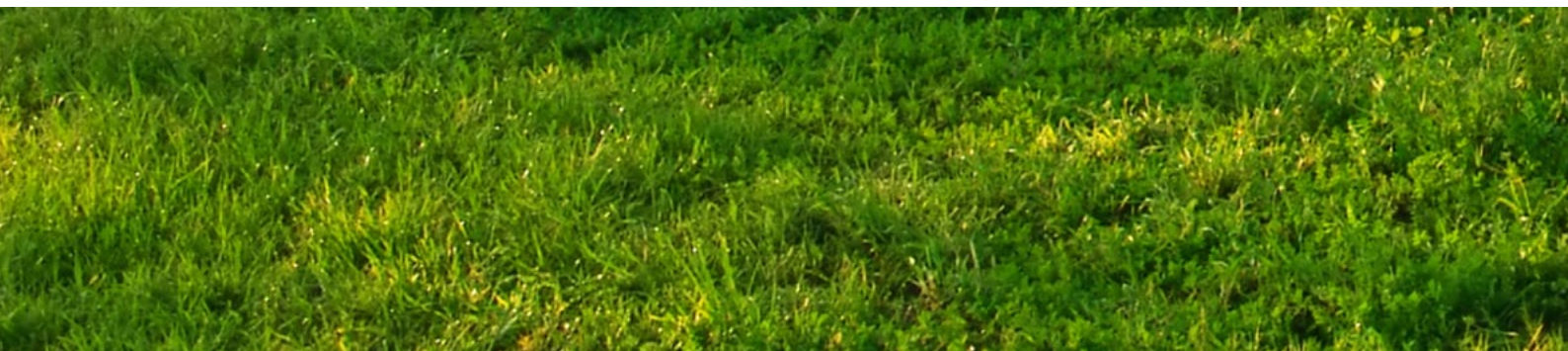
THE TAX INSTITUTE



2021 Barossa Convention

28–30 April 2021 | Novotel Barossa Valley Resort

13 CPD hours



Welcome

To “The Great Taxby” Barossa Convention

Stunning Barossa Valley vistas. Stimulating discussion and expertise. The top rung of tax society. This is one event you won't want to miss.

Join us this April as we bring a little glitz and glamour to tax in 2021 at “The Great Taxby” Barossa Convention 2021. Gain insight and rub shoulders with those in the know at South Australia's best-known event for SME practitioners.

Over three days, you'll immerse yourself in top tax technical insight, practical guidance and professional networking opportunities. With a rich history of technical excellence, the Barossa Convention is an event worth blocking out your calendar for.

So what do you say, old sport – will we see you there?

High Quality Program

The Convention Organising Committee has brought together a diverse range of high-profile, expert presenters from across the profession to deliver the top-quality technical sessions. There'll be plenty of key takeaways with all sessions to have practical examples, tips and strategies delivered in a range of formats including case studies, panels and plenaries.

With 2020 being a year like none other in recent history, we have each seen changes to the way we go about our daily lives, the way we work and conduct business. Unsurprisingly, this has also led to new tax challenges as the legislators, ATO and practitioners play their part in introducing new legislation or in interpreting existing principles to apply to new, unique scenarios. This year's convention has been curated to consider some of the most relevant changes and anticipate tax challenges we are likely to face in the near future, to provide relevant, timely guidance to tax practitioners.

Unique Industry Networking and Idyllic Destination

This year we're excited to be heading to Saltram Winery for “The Great Taxby” Thursday Gala Dinner, here you'll take in 160 years of heritage in the original refurbished winery including a tasting at the Cellar door and great entertainment. Combined with the “Wine Down Pre-Convention Networking Event” on Wednesday night, there's plenty of opportunity to meet up with friends and peers, old and new, from accounting, law, financial services and regulatory backgrounds, while in the Barossa Valley, an iconic destination for interstaters and locals alike.

The Convention Resort overlooks rolling vineyards but why not take time to visit other famous and yet discovered cellar doors before or after the Convention. We recommend you take the opportunity to extend your Barossa visit into the weekend. Details of all the pre- and post-activities can be found later in this brochure.

Don't hesitate – book now to take advantage of early bird registration offers and ensure 2021 is the year you visit the Barossa.

It's tax time old sport – look forward to seeing you in the Barossa!



Ben Turner, FTI
Chair, 2021 Barossa Convention Organising Committee

Thank you

The Tax Institute gratefully acknowledges the contribution of our event presenters and members of the 2021 Barossa Convention Organising Committee, who have all generously volunteered their time and expertise:

Mark D'Angelica, FTI, BDO

Leo Efthivoulou, CTA, ENA Law

Will Fennell, Piper Alderman

Melissa Harrison, Australian Taxation Office

George Hodson, CTA, Thomson Geer Lawyers

Neil Oakes, CTA, Perks

Tom Paltridge, CTA, Grant Thornton

Nicole Peterson, CTA, PKF Adelaide

Raoul Stevenson, CTA, Nexia Edwards Marshall

Ben Turner, FTI, EY, Chair

Nick Wilkins, CTA, Wilkins Advisory

Proudly supported by:



Technical program

Pre-Convention Networking Session – Wednesday 28 April 2021

Time	Session	Presenter
5.00pm – 7.00pm	Registration	
7.00pm sharp	Barossa Convention Welcome Reception <i>"Wine Down Networking Session"</i> You no doubt impress your friends and clients with your in-depth tax knowledge but why not add wine knowledge skills to the mix! Take this opportunity to learn all about and enjoy delicious South Australian wine varieties in this fun, friendly networking reception.	Hosted by our sponsor Wine Direct

Day 1 – Thursday 29 April 2021

Time	Session	Presenter
7.45am – 8.30am	Registration	
8.30am – 8.45am	Welcome and opening address	Ben Turner, FTI EY Peter Godber, CTA 2021 President The Tax Institute
8.45am – 9.45am	Session 1: Revenue versus Capital: the gift that keeps on giving! Revenue or capital? It's an age-old question that continues to be debated in the Courts across a wide range of industries. The recent decisions in <i>Origin</i> , <i>Healius</i> , <i>Mussalli</i> , <i>Greig</i> and <i>Sharpcan</i> demonstrate the distinction is far from settled. Hear from one of Australia's pre-eminent barristers, Terry Murphy QC, as he discusses the impact of some of these recent decisions and how advisers may better equip themselves in their understanding of how the Courts and the Australian Taxation Office have recently approached these issues.	Terry Murphy QC Victorian Bar
9.45am – 10.30am	Session 2: Unique COVID FBT issues For many, the 2021 FBT year altered the way we worked, possibly forever. With this, employers were incurring unique costs for their employees that have not previously been considered. This session considers the FBT challenges in interpreting and applying the law to these benefits including: <ul style="list-style-type: none"> — Provision of home office equipment, loan vs gift — Payment of health care, quarantine costs — Implications of additional costs due to trapped employees or change of LAFHA arrangements — Meal entertainment options in a non-standard year — Logbooks where employees are working from home or changing their use of cars, ensuring compliance without a budget blowout and — Application of budget announcements, reskilling employees and the car parking threshold adjustment. 	Ben Turner, FTI EY
10.30am – 10.45am	Morning tea	

Technical program

Day 1 – Thursday 29 April 2021 continued

Time	Session	Presenter
10.45am – 11.30am	<p>Session 3: Corporate Residency and Private Groups</p> <p>Historically, the use of foreign incorporated companies within a private group structure has been an effective structure for expanding into foreign markets. Using a domestic vehicle generally makes doing business easier while enabling the group to access certain tax deferrals and concessions on income and capital gains.</p> <p>Since the decision in <i>Bywater</i> and the release of TR 2018/5, many private groups found themselves with foreign incorporated companies that may technically be Australian tax residents. This outcome can give rise to several problematic domestic tax issues, including:</p> <ul style="list-style-type: none">— Quarantining the profits of the foreign entity at the foreign corporate tax rate (subject to Australia's CFC rules and transfer pricing regime)— Accessing the dividend exemption under Subdivision 768-A ITAA 1997— Accessing CGT reductions under Subdivision 768-G ITAA 1997— Application of s23AH branch exemption to 'foreign' subsidiaries— Determining the members of a tax consolidated group and whether foreign subsidiary members may be considered part of an Australian group depending on where decisions are made— Whether the CFC rules apply to the entity and implications for common foreign 'hybrid' flow through entities— Application of Australia's double tax treaties. <p>This session will apply practical examples to analyse the historical position of corporate tax residency, the administrative challenges arising under the decision in <i>Bywater</i> and TR 2018/5 (with specific focus on the potential impact of COVID-19 travel restrictions), and how the reforms announced in the recent Federal Budget might look to unwind the mess and apply in practice.</p>	<p>Phil Shepherd, CTA KPMG</p>
11.30am – 12.15pm	<p>Session 4: Individual Residency, with consideration of COVID implications</p> <p>Does your client still call Australia home? Does your client intend to never call Australia home again? Was your client forced to call Australia home? Australia's shortly stated residency rules involve a complexity of fact and degree made more challenging by changing work patterns and the events of 2020. Add to this the need to consider the interaction with Australia's double tax agreements and the fundamental importance of residence to how individuals are taxed, it is unsurprising that residency of individuals continues to be a topical issue.</p> <p>This session will include a discussion of:</p> <ul style="list-style-type: none">— Recent key cases— Residence under the Double Tax Agreement and why it's important— Impact of COVID-19— Documents and evidence – what the ATO may ask for.	<p>Danielle Ellershaw Australian Taxation Office</p>
12.15pm – 1.15pm	Lunch	

Technical program

Day 1 – Thursday 29 April 2021 continued

Time	Session	Presenter
1.15pm – 2.00pm	Session 5: Global economic changes and recovery post 2020 Following the events of 2020, clients are sensitive to global economic changes more than ever before. Tim will delve into some of the tectonic shifts in consumer patterns and monetary policy that shaped market returns in 2020, and discuss how these factors shape his view of the market outlook and the global economic recovery. He'll discuss how his team picks companies for model portfolios and provide a case study that demonstrates how they de-construct barriers to entry and management alignment.	Tim Clark Morgan Stanley
2.00pm – 2.45pm	Session 6: State Tax Update There has been significant change to state based taxes in recent times, in this session you'll hear critical updates on: <ul style="list-style-type: none"> — Land Tax <ul style="list-style-type: none"> — Assessment update — Discretionary Trusts — Grouping — Principal Place of Residence — Super Funds — Stamp Duty <ul style="list-style-type: none"> — Qualifying/Non-qualifying land — Proposed Rewrite — Payroll Tax 	Paul Ingram, CTA Minter Ellison
2.45pm – 3.00pm	Afternoon tea	
3.00pm – 3.45pm	Session 7: ATO Rulings on travel expenses The ATO have been revising their guidance on transport expenses with the issue of draft taxation rulings TR 2017/D6 and TR 2019/D7 in recent years. At the time of writing, clarity on the ATO's position is imminent with the release of the below rulings: <i>Income tax: when are deductions allowed for employees' transport expenses?</i> <i>Income tax and fringe benefits tax: deductibility of employees' accommodation and food and drink expenses</i> This session will be a deep dive into the nuances of the finalised rulings to determine when an individual is: <ul style="list-style-type: none"> — Travelling for work — Living away from home or — Relocating. The session will analyse the factors that lead to the crossover point for each of these, and consider the relevant implications for income tax purposes and FBT.	Megan Field, CTA Deloitte



Technical program

Day 1 – Thursday 29 April 2021 continued

Time	Session	Presenter
3.45pm – 4.45pm	Session 8: Businesses in distress: pitfalls and opportunities As the world recovers from the economic and social challenges of 2020, the unfortunate reality is that many businesses will not survive the withdrawal of significant economic and regulatory government intervention. In particular, the removal of relief measures implemented by the ATO and ASIC in 2020 will present many issues for businesses and advisers in Australia. Indeed, advisers will need to be wary of zombie companies otherwise they may come back to bite them! This panel session will draw on the experience from tax and insolvency specialists in helping practitioners understand: <ul style="list-style-type: none">— What are their obligations and when can they get into trouble— How to spot potential issues— What is the ATO's current approach to recoveries— What opportunities are there for businesses in this new world?— The art of defending the preference payment.	Tim Clifton, FTI Clifton Hall Rebecca Smith Australian Taxation Office Cameron White Thomson Geer Lawyers
4.45pm – 5.45pm	Free time	
5.45pm sharp	Bus departs for <i>"The Great Taxby"</i> Gala Dinner	
6.15pm – 10.30pm	Join us for the <i>"The Great Taxby"</i> Gala Dinner at Saltram Winery	
10.30pm sharp	Bus departs Saltram Winery for Novotel Barossa Valley Resort	

The Great Taxby Gala Dinner Thursday, 29 April 2021

Join your colleagues at the Great Gatsby themed dinner for a fun evening of networking and entertainment. Be sure to frock up and channel your inner Jay, Daisy, Jordan, Tom, Nick or Myrtle!

Held at the famed Saltram Winery you'll experience over 160 years of heritage, prestigious Barossa Valley wines, local produce and great entertainment.

Venue:	Saltram Winery, Angaston Rd, Angaston
Time:	6.15pm – 10.30pm
Dress:	The Great Gatsby themed business attire
Transport:	Bus transfer available (see registration part 3)
Price:	Included for full registration delegates (limited availability)
Additional tickets:	\$150.00

Technical program

Day 2 – Friday 30 April 2021

Time	Session	Presenter
8.15am – 8.45am	Registration	
8.45am – 9.30am	Sessions 9: CGT Main residence exemption – A look at impacts for foreign residents Prima facie the main residence CGT exemption appears relatively straightforward and whilst it is one of the most common CGT exemptions individuals' access, the rules can become quite complex. Even more so when considering periods of foreign residency for an individual. With recent events, there has been an increase in individuals returning home and being faced with decisions around the sale of their main residence. In this session we look at the complexities and considerations that arise in a range of scenarios, covering issues such as: <ul style="list-style-type: none"> – The importance of understanding residency and the impacts whilst away – Selling the home whilst a foreign resident – The exceptions available if a foreign resident satisfies certain 'life events' – Interaction with the "absence rule", the 6-year limit – The choice between more than one main residence – Renting out a portion of property (eg consulting/hairdresser) – Interaction and application of the CGT discount rules, including the different methods available – When valuations are required and what records should be kept – Missing out on the main residence exemption, what are the considerations? 	Natasha Wegener PwC
9.30am – 10.15am	Session 10: Lost in (company) losses In the current environment, many businesses will have suffered tax losses, and will be looking to convert them to cash through the loss carry back measures, or at least to preserve them to use against future taxable income. This session will revisit the continuity of ownership test and the business continuity tests, with reference to: <ul style="list-style-type: none"> – The similar business test and LCR 2019/1 – Preserving company losses in private group structures – Detailed review of the loss carry back legislative changes – Loss carry back compliance and risk including planning opportunities. 	Sean van Der Linden, CTA EY
10.15am – 10.30am	Morning tea	
10.30am – 11.15am	Session 11: Tax Policy and Advocacy Update Update on the key advocacy activity and further insight into current hot policy topics.	Tax Policy and Advocacy Team The Tax institute
11.15am – 12.15pm	Session 12: Opportunities for attracting capital and incentivising staff 2020 provided many with the opportunity (welcome or otherwise) to free up time and start working on the next big thing. But with access to funding harder than ever, some ideas may never become a reality. Never fear, the start-up regimes are here! This session will review: <ul style="list-style-type: none"> – The state of play of the ESIC regime and how start-ups can take advantage – How to incentivise employees when cash is tight and the benefits of the start-up tax concession – Are there any restructuring opportunities in the context of the ESIC regime and start-up tax concession? – Must founders always miss out? 	George Hodson, CTA Fiona Stapleton Thomson Geer Lawyers
12.15pm – 1.15pm	Lunch	

Technical program

Day 2 – Friday 30 April 2021 continued

Time	Session	Presenter
1.15pm – 2.00pm	Session 13: Professional firm structuring & professional firm allocation of profits Modern tax planning for professionals can be traced back to 1956, when in Peate's case 8 doctors in Cessnock, New South Wales, incorporated their practice and established practice companies owned by family trusts. On 1 March 2021, the ATO issued draft Practical Compliance Guideline PCG 2021/D2 (Allocation of professional firm profits – ATO compliance approach) which will affect many professional firms, including those in the accounting, architectural, engineering, financial services, legal and medical professions. This session will discuss: <ul style="list-style-type: none"> — Structuring professional practices—ATO's 2015 Guidelines (withdrawn in 2017) — Draft PCG 2021/D2 <ul style="list-style-type: none"> – when does the draft PCG apply? – satisfying Gateways 1 and 2 – applying the “risk assessment scoring table” – what the draft PCG does not do – date of effect & transitional arrangements — Worked examples & commentary 	Michael Butler, CTA Tom Hendrick, FTI Finlaysons
2.00pm – 2.45pm	Session 14: Estate and Succession Planning Estate and succession planning is an increasingly important, challenging and enjoyable area of tax practice – due to the vast and expanding wealth of baby boomers entering their prime estate planning years at a time of unprecedented litigation risk and structure complexity. The days of ‘estate and succession planning’ meaning a new Will, power of attorney and advance care directive are gone. Achieving estate and succession planning objectives is now one of if not the most prevalent impetus for complete restructures, significant asset migrations and powerful tax strategies. This session will consider modern estate planning issues and techniques for more complex and/or higher net worth clients, including: <ul style="list-style-type: none"> — Changes to the taxation of testamentary trusts — Division 7A considerations in the context of estate planning — Tax effective restructure options to simplify estate administration and reduce claims — Hardwiring the passing of control of companies and trusts on death, without losing control or flexibility in the meantime — Bloodline and relationship breakdown protections, stamp duty considerations and superannuation issues. 	Matthew Andruchowycz, CTA Kovich & Co
2.45pm – 3.00pm	Afternoon tea	
3.00pm – 3.45pm	Session 15: Discretionary Trusts – Issues: new and old Discretionary trusts have become a fundamental tool in structuring businesses and investments in Australia. In 2018, figures from the Australian Tax Office show there were more than 800,000 trusts with assets totalling more than \$3 trillion operating in Australia. The majority of these are discretionary trusts and they have a key role in the Australian economy. This session will consider the key issues and intricacies that we deal with in practice: <ul style="list-style-type: none"> — Why – the benefits — Why not – PSI, R & D, etc — 100A – the rise of the spectre — 99B – an unforeseen result. 	Julie Van der Velde, CTA VdV Legal

Technical program

Day 2 – Friday 30 April 2021 continued

Time	Session	Presenter
3.45pm – 4.30pm	Session 16: The Post-COVID wasteland impacting SME deals Have you considered how deals have changed as a result of short-term COVID stimulus measures? How can you make sure the outcomes for your client will still be tax effective? This session will help you navigate restructuring and transaction decisions which have been impacted by COVID and other concessions including: <ul style="list-style-type: none">– The impact of asset rollovers for SMEs on moving to a preferred business structure– The tax consolidation flow-on impacts from rollovers– Impacts on deals from COVID concessions, in particular:<ul style="list-style-type: none">– Asset write-offs;– Stimulus grants;– Loss carry-back;– Tax losses;– Deferred tax liabilities; and– Franking account impacts.– Additional due diligence considerations with entity and asset acquisitions.	Simon How, CTA Bentleys
4.30pm	Convention close	Ben Turner, FTI EY Nick Wilkins, CTA Wilkins Advisory

Join the conversation



facebook.com/thetaxinstitute



linkedin.com/company/the-tax-institute



twitter.com/taxinstituteoz



insights.taxinstitute.com.au



Presenter profiles

Matthew Andruchowycz, CTA, is a taxation and superannuation specialist. He works primarily with accountants, financial planners, business owners and high net wealth individuals on commercial transactions and taxation and superannuation matters.

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 property taxation, corporate restructurings, small business CGT reliefs, cross-border investment, trusts, and estate & succession planning. Michael is a past chair of The Tax Institute's South Australian State Council and a regular contributor to Institute events.

Tim Clark, has 13 years of experience in portfolio management, equity research and investment banking in Australian and international markets. In 2019, Tim joined Morgan Stanley in Adelaide as a portfolio manager. Tim has had a truly global career having worked and lived in Sydney and Boston for Massachusetts Financial Services and visited more than 30 global cities to research companies. Tim's primary responsibility at MFS was researching and recommending global consumer and industrial companies for portfolios with funds under management in excess of US\$500bn. He has travelled extensively across North America, Europe, China, India and Japan to research companies. Prior to MFS, Tim worked as an investment banking analyst at Deutsche Bank in Sydney where he advised on and implemented equity capital raisings including follow-on and initial public offerings. Tim started his career in Adelaide in 2006 working in corporate advisory for Taylor Collison.

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

managing and selling businesses as well as investigating and pursuing recoveries on behalf of creditors.

Danielle Ellershaw, is an Assistant Commissioner in Tax Counsel Network responsible for providing leadership on technical issues that are a priority for the ATO. Danielle has held a range of roles in the ATO and deals with issues during audit, advice products, litigation and legislative development with a focus on international tax. Her most recent work relates to individual residency issues, the Multinational Anti-avoidance Law and legal professional privilege issues in the context of the ATO's information gathering powers.

Megan Field, CTA, is a Tax Partner at Deloitte in Adelaide with over 20 years' experience in providing business and taxation advice to Australian subsidiaries of multinationals, listed Australian corporations as well as family-owned organisations. Megan has significant experience in advising on fringe benefits tax issues for all types of organisations and their employees and also high net worth individuals. Her experience includes advising on tax-effective remuneration structuring, expatriate policies, preparation of FBT policy manuals and FBT private rulings.

Tom Hendrick, FTI, is an Associate in the Tax & Revenue Group at Finlaysons. He advises clients on issues relating to federal, state and international taxes. Tom has a practical understanding of the tax and superannuation systems and also worked as a Tax Technical Advisor at the Australian Tax Office for over 2 years.

George Hodson, CTA, is a Partner at Thomson Geer. George advises on taxation, transactional, structuring and tax controversy matters. He acts for a range of private, public and government clients and has extensive experience in taxation advisory as well as dispute resolution with revenue authorities. George presently sits as the chair of the SA Technical Resource Committee and on the National Dispute Resolution Committee with The Tax Institute.

Simon How, CTA, is a tax consulting partner at Bentleys SA. Simon provides specialist taxation advice with a focus on clients in the SME & International

market. Simon regularly provides advice on tax aspects of deals, structuring and restructuring groups with a particular focus on tax consolidation and CGT outcomes. Simon has over 23 years experience in public practice and with the ATO and is a regular contributor to The Tax Institute and other relevant bodies.

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

Terry Murphy QC, has focussed on advising and appearing for taxpayer and revenue authorities in the Federal Court and High Court and in alternative dispute resolution for over 30 years. He was appointed to be the Special Counsel to the Australian Taxation Office from 2008 to 2010, is a member of Taxation Subcommittee of the Law Council, Chair of the Tax Group Advisory Board, and a Senior Fellow of the University of Melbourne Law School.

Phil Shepherd, CTA, is a Director at KPMG and a tax specialist working primarily with middle market corporates and large family groups. With over 13 years of experience providing tax advice to domestic and international groups, Phil has a passion for seeing global businesses thrive in South Australia. Phil has a broad skillset which includes advising significant global entities on tax risk management, structuring private groups for divestment or IPO and developing succession and estate planning strategies for high net worth families. Phil is a Chartered Tax Advisor and a member of the Institute of Chartered Accountants.

Rebecca Smith, was admitted to practice in 2001 and has held in various legal roles in the ATO since 2008. She is currently a senior lawyer in the Review and Dispute Resolution Branch, an independent business line responsible

Presenter profiles continued

for managing tax technical, debt recovery and insolvency litigation on behalf of the Commissioner.

Fiona Stapleton, is Senior Associate in the tax team at Thomson Geer Lawyers. She has experience in providing taxation and commercial advice to a wide variety of clients including private and listed companies, high net worth individuals and private equity funds. Fiona enjoys working closely with clients to understand their commercial issues and objectives in order to deliver the right outcomes. She is a current member of the Tax Institute's Women in Tax, Membership and Professional Development Committees and the National Women in Tax Congress.

Scott Treatt, CTA, is the General Manager of Tax Policy and Advocacy at The Tax Institute. He is a Chartered Tax Advisor and has been practicing as a tax specialist since 1997, gaining his experience in large 2nd tier and Big 4 accounting firms as well as Government. Through the years he has been engaged on direct and indirect tax issues pertaining to individuals, start-ups, small businesses, private groups and multinationals, addressing issues including, but certainly not limited to, asset, business and entity transactions and disposals, insolvencies, structuring, succession and disputes (within family groups as well as with the ATO). Scott has a passion for our tax system and tax education, continuously seeking to find opportunities to improve the efficiency and effectiveness of both. He is a

regular presenter at industry events and had been a lecturer for some 12 years in The Tax Institute's structured education programs.

Ben Turner, FTI, is a Senior Manager in EY's People Advisory Services team. Ben is a Chartered Accountant with over 15 years' experience specialising in taxation issues including expatriate taxation, Fringe Benefits Tax, superannuation/social security and payroll tax. Ben works closely with major organisations, particularly in the Human Resources and Finance areas to address remuneration and tax issues and tools to maximise planning opportunities and manage risks affecting the workforce. This includes designing effective processes, systems particularly with globally mobile workforces.

Cameron White, is a Special Counsel at Thomson Geer. He has extensive experience in litigation in the Supreme, District and Magistrates' Courts of South Australia, the Federal Court and the Federal Circuit Courts of Australia and other courts and tribunals throughout Australia. He works predominantly in insolvency related litigation with an emphasis on secured and unsecured debt recoveries as well as general litigation. Cameron has been recognised by Doyle's Guide as a 'Rising Star' in Commercial Litigation, Dispute Resolution & Insolvency Law in Australia (2018 & 2019).

Sean van Der Linden, CTA, is a partner at EY, specialising in corporate and

international tax. Sean regularly advises clients on the buy-side or sell-side of transactions. He provides commercially focussed advice on capital gains tax, tax consolidation, financing and structuring of transactions, and tax due diligence. Sean has been a State Councillor for many years, and is a past Chair of State Council and past Chair of the Professional Development Committee for The Tax Institute.

Julie van der Velde, CTA, is the principal of a specialised commercial law firm, VdV Legal, and has degrees in Business and in Law and a Masters of Taxation Law. With over 20 years' experience advising South Australian businesses, her practice focuses on taxation and trust law with an emphasis on business structuring, tax planning, business succession and intergenerational transfers. Julie is The Tax Institute's SME Chartered Tax Adviser for 2017 and is listed as a recommended tax lawyer and a recommended Wills, Estates and Succession Planning lawyer in Doyle's Guide 2017, 2018 and 2019

Natasha Wegener, is a Senior Manager in PwC's People & Organisation business in the Adelaide office. She has over 20 years of experience working in tax. She specialises in the area of global mobility and Australian employment taxes and have worked for a global corporation, as well as professional services firms. Natasha is also a member of the Australian and New Zealand Chartered Accountants.

“The Barossa Convention is, without doubt, the premier event for tax advisers in South Australia each year. It is a terrific opportunity to obtain cutting edge knowledge from leading speakers with considerable practical insight and experience. I also look forward to the event each year as a great networking and collegiate experience and I highly recommend it to all professionals involved in the tax advisory community both in SA and interstate.”

Peter Slegers, CTA, Cowell Clarke



Venue and accommodation



Novotel Barossa Valley Resort

42 Pioneer Avenue, Rowland Flat Barossa Valley

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

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

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

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

Getting to the Novotel Barossa Valley Resort

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



Social activities



Welcome Reception – “Wine Down Networking Session” Wednesday 28 April 2021

The Welcome Reception is included in the registration fee for delegates attending the full Convention. Welcome Reception includes stand up dinner and drinks. Join us for an evening of networking and a showcase Barossa's best food and wine.

Convention Gala Dinner – “The Great Taxby” Thursday 29 April 2021

This year we're excited to be heading to Saltram Winery for “The Great Taxby” Gala Dinner. Make sure you channel your inner Daisy Buchanan, Nick Carraway or even the Jay Gatsby himself. Don't miss out the chance to network with your colleagues and to meet with new professionals at this charming 160 years of heritage venue whilst enjoying great food, wine and entertainment.

Please note: Due to COVID-19 restrictions we have limited space available at the Thursday night Convention Gala Dinner. If you would like to attend please ensure you tick the attendance box on Section 3 on the registration form.

SA Tax Institute “Tour de Tax” bike ride Wednesday 28 April 2021

Participate in an organised 72-kilometre group bike ride from Adelaide (leaving Victoria Square at 1.30pm) to the Novotel Barossa Valley Resort (Rowland Flat) via Gorge Road and a stop at Cudlee Creek (or for a shorter ride, join the peloton at Cudlee Creek). Arrival at the resort is timed for 5.30pm. Please indicate your interest on the registration form.

Endota Spa

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

Golf at the Tanunda Pines Clubhouse

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

The Tasting Room

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




Event information

Registration options and inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Convention lunches	Convention welcome reception and gala dinner*	How to register
A Full convention registration This registration option entitles one delegate to attend the entire event.	✓	✓	✓	Register online or complete the form included in this brochure.

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

 **Register online at** taxinstitute.com.au/2021barossa

Registration inclusions

Full convention registration includes participation in the full technical program, electronic access to all available materials via the Barossa Convention Event App, attendance at the Wednesday Welcome Reception and Thursday Gala Dinner and all refreshments during convention hours. Registration fees do not include travel, accommodation or hotel incidentals.

Early bird registration

All registrations received and paid for in full by Friday 19 March 2021 will be entitled to the early bird rate.

The 2021 Barossa Convention event app

The registration fee includes electronic access for delegates to download all available presenter materials and event information prior to the event. The 2021 Barossa Convention Event App will contain session and presenter information, event materials, sponsor offers and other relevant event information. Email notification will be sent to all registrants in the weeks prior to the convention.

CPD accreditation

Attendance at the convention counts for 13 hours Continuing Professional Development Accreditation with The Tax Institute.

Business Alliance Partners

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

Dress code

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

Wi-Fi

Internet access will be available for convention delegates using a dedicated access code, provided to delegates on registration. Wi-Fi is accessible in the function foyer and conference rooms from 5.00pm Wednesday, 28 April to 5.00pm Friday, 30 April 2021.



Event information continued

Covid-19 event guidelines

At The Tax Institute, the health and wellbeing of our employees, members and delegates is our top priority. Whilst returning to face to face events, we continue to actively monitor the situation regarding COVID-19 and follow the latest advice and guidelines issued by the Department of Health, the World Health Organisation and relevant State authorities.

Please [click here](#) for a summary of the measures The Tax Institute has put in place to ensure the safety of attendees at our face to face events, along with helpful links to assist you in preparing for your attendance at them.

Please note, final implementation of any of these measures is subject to Federal and State Government requirements at the time of each event.

Contact tracing

We will keep a record of attendance for all meetings and events of The Tax Institute and will use this data for contact tracing purposes if necessary. For more information on how we will use the data that will be collected, and your rights in relation to that information, please see our [Privacy Policy](#).

Cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program.

Should a face to face event be cancelled due to an event beyond The Tax Institute's reasonable control including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

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

If a registered delegate is unable to attend a face to face event as a result of interstate border closures or they reside in or visited a COVID-19 hotspot, we will endeavour to transition the registration to an online registration for the event. If there is a difference in price a credit will be provided to delegates to be used at a future event. If a delegate does not wish to transition their registration to the alternate online event, a full refund/ credit will be provided.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee.

The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

Enquiries

For further information regarding this event, please contact Annie Daryani on 08 8463 9444 or email sa@taxinstitute.com.au





THE TAX INSTITUTE

2021 Barossa Convention Registration form

41412 | WD

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

1 Registration

Please see page 14 for registration inclusions.

	Member	New member*	Non-member
Early bird registration (Register on or before 19 March 2021)	<input type="checkbox"/> \$1450	<input type="checkbox"/> \$1790	<input type="checkbox"/> \$1750
Standard registration (Register after 19 March 2021)	<input type="checkbox"/> \$1650	<input type="checkbox"/> \$1990	<input type="checkbox"/> \$1950

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

Dietary requirements:

Promotional code:

*Become a member and save!

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and save with:

- up to 50% off membership to 30 June 2022
- member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at info.taxinstitute.com.au/membership.

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

Signature:

Date of signature:

2 Delegate contact details

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

Member no.:

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify)

First name:

Position:

Address:

Suburb:

Telephone:

Mobile:

Last name:

Company:

State:

Postcode:

Fax:

Email:

☐ Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking purposes.

3 Convention Dinners

The Wednesday Welcome Reception and Thursday Convention Gala Dinner ARE BOTH included in the full convention registration fee for delegates.

Please note: Due to COVID-19 restrictions we have limited space available at the Thursday night Gala Dinner. If you would like to attend please ensure you tick the attendance box.

Yes, I WILL be attending BOTH dinners ☐ Yes

I WILL be attending the Welcome Reception on Wednesday 28 April ☐ Yes ☐ No

I WILL be attending the Convention Gala Dinner on Thursday 29 April ☐ Yes ☐ No

Convention Dinners Transportation

The Thursday Convention Gala Dinner bus transfer is included in the registration fee for full convention delegates.

☐ I WILL require the return bus transfer to the Convention Gala Dinner (from Novotel Barossa) on Thursday 29 April

☐ I WILL NOT require the return bus transfer to the Convention Gala Dinner

Additional Convention Tickets

☐ Yes, I require additional tickets for the convention Wednesday Welcome Reception

☐ Yes, I require additional tickets for the convention Thursday Gala Dinner

Cost	No. of tickets	Sub-total
\$150	<input type="text"/>	\$ <input type="text"/>
\$150	<input type="text"/>	\$ <input type="text"/>

4 Optional activities selection

SA Tax Institute "Tour de Tax" bike ride – Wednesday 28 April 2021 (1.30–5.30pm)

This activity IS included in the delegate registration fee.

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

5 Accommodation

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

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

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

Sharing room with:

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

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

6 Payment summary

Registration fee	\$ <input type="text"/>
Additional guest tickets – Welcome reception (\$150 each)	\$ <input type="text"/>
Additional guest tickets – Conference dinner (\$150 each)	\$ <input type="text"/>
Accommodation	\$ <input type="text"/>
Total payable	\$ <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

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

Name on card:

Card no.: Expiry date: Cardholder's signature:

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

For further information regarding this event, please contact Annie Daryani on 08 8463 9444 or email sa@taxinstitute.com.au.

- ☐ I do not wish to have my details available to other convention attendees.

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] 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 in accordance with TTI's Privacy Policy.

TO REGISTER

➤ **Online** taxinstitute.com.au/2021barossa

@ **Email** customeradmin@taxinstitute.com.au

✉ **Mail** L37, 100 Miller Street, North Sydney NSW 2060

☎ **Fax** 02 8223 0077

Stay and play in the world famous Barossa Valley

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

To help you plan, visit www.barossa.com and use the Trip Planner to create your own wine tasting itinerary. Or, follow a wine trail and discover one of the Barossa's sub-regions, you could spend a day exploring the Bethany to Angaston Trail, Seppeltsfield Road or Nuriootpa Wine Trail.

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

Experience some Barossa adventure

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

Soak up some history

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

Art Lovers

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





THE TAX INSTITUTE

L37, 100 Miller Street
North Sydney NSW 2060

Tel 02 8223 0000
Fax 02 8223 0077

For information, please contact SA team
at sa@taxinstitute.com.au

taxinstitute.com.au