THE TAX INSTITUTE

28th Noosa Tax Intensive

Reinvented for 2020

12–13 November 2020
Sofitel Noosa Pacific Resort | Crowne Plaza Terrigal

12 CPD hours

Welcome

Family Business – continuing differently to thrive beyond 2020

2020 – what a year it has been! One should always expect the unexpected, but this year has exceeded in throwing out curveballs. While not always positive, there are many inspiring stories of how people and businesses have survived natural disasters and COVID-19. We've seen communities become stronger and the movement to support local businesses has been ubiquitous, especially for family businesses.

As a tax community, we should be proud of our key role in this, including to help navigate businesses through their challenges and assist in accessing government stimulus. This role will be important for as long as the economic crisis continues and especially as we track towards an economic recovery.

In that context, attending this year's premier SME tax event in Australia, the 28th Noosa Tax Intensive, is a must! Amid uncertainty on how long it will take for the COVID-19 fog to clear, all businesses are challenged to continue differently. Professor Justin Craig's keynote will highlight what that means for family businesses in a broad sense. We will then draw from that as we dive into the key tax and governance issues that family businesses need to embrace to set themselves apart during this period.

COVID-19 restrictions have posed unique challenges for the organisation of this year's Noosa event. Of course, many of you will be uncertain about or be unable to travel. So, in "the show must go on" spirit, we are bringing the Noosa experience to you! You can choose one of two great locations: the traditional Sofitel Noosa Pacific Resort or the Crowne Plaza Terrigal. Speakers will be located across both venues and otherwise livestreamed in. You will have workshops face-to-face and we're even providing a pre-event opportunity for online discussions on preliminary reading.

Please register early to guarantee one of the (COVID-reduced) spots. I look forward to seeing you there!

Paul Banister, CTA
Chair, Noosa Tax Intensive Organising Committee

Thank you

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

Paul Banister, CTA, Grant Thornton (Chair – Noosa Tax Intensive Organising Committee)

Anthony Bach, CTA, Australian Taxation Office

Martin Booth, CTA, Pitcher Partners

Leo Efthivoulou, CTA, ENA Law

John Middleton, CTA, Australian Taxation Office

Kim Reynolds, CTA, Vincents

Geoff Stein, CTA, Brown Wright Stein

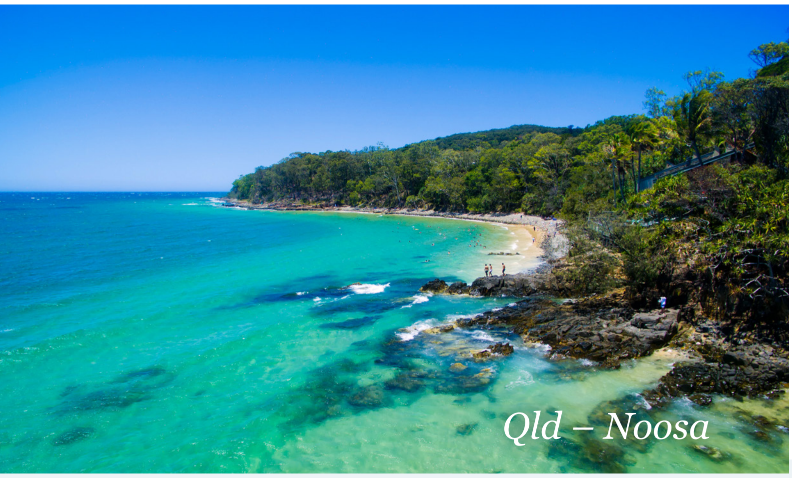
Linda Tapiolas, CTA, Cooper Grace Ward Lawyers

Rachel Vijayaraj, CTA, Brown Wright Stein Lawyers

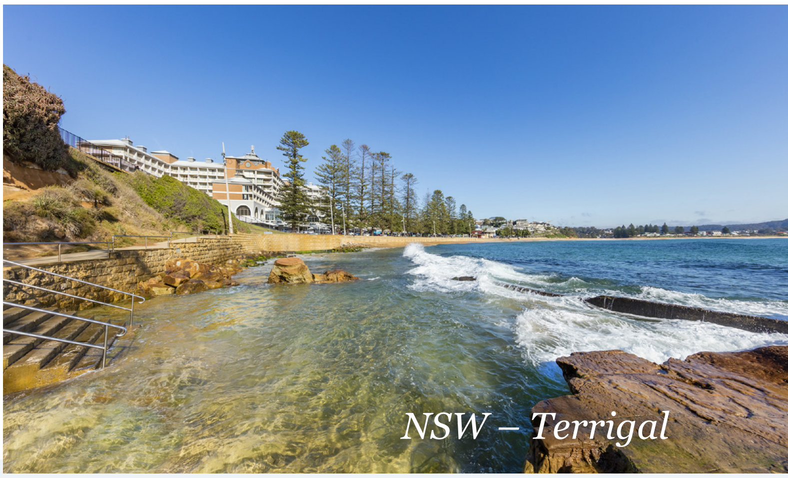
Emma Woolley, CTA, Hall & Wilcox Lawyers

Early bird offer
Register on or before Friday, 25 September 2020 to save!

Technical program



Qld – Noosa



NSW – Terrigal

Plenary sessions are split between the two state venues, so no matter which location you choose, you'll have the opportunity to attend plenary sessions in person. Those sessions not held at your venue will be livestreamed to you.

Please refer to the program marked with the following colours and icons to see where sessions are hosted.

QLD	Live in Sofitel Noosa Pacific Resort
NSW	Live in Crowne Plaza Terrigal
F2F	Face-to-Face sessions are held at each state venue

Day 1 – Thursday, 12 November 2020

Time	Session	Presenter
F2F Qld 7.30–8.00am NSW 8.30–9.00am	Registration	
F2F Qld 8.00– 8.10am NSW 9.00–9.10am	Official opening	**Paul Banister, CTA** Chair, 2020 Noosa Tax Intensive Organising Committee **Todd Want, CTA** NSW Event Chair
QLD Qld 8.10–8.30am NSW 9.10–9.30am	President's welcome	**Peter Godber, CTA** President – The Tax Institute

Technical program

Day 1 – Thursday, 12 November 2020 continued

Time	Session	Presenter
QLD Qld 8.30–9.00am NSW 9.30–10.00am	**Keynote: Continuing differently: Building trust in decision-making teams** To survive and thrive through and beyond a crisis involves continuing differently. In doing that, building and maintaining trust is an ongoing challenge for all. Leaders of business-owning families put trust at the epicentre of their world through the commitment to developing and implementing four independent but interdependent plans: – The strategic plan – The wealth, estate and asset plan – The talent development plan – The governance plan. Understanding the importance of these plans provides much needed accountability in the family, ownership and business systems. In configuring their own way forward, they consider that planning is not about control, but about trust. Successful leaders will be conscious that continuing differently requires building trust in their decision-making teams.	**Professor Justin Craig** Bond University
NSW Qld 9.00–10.00am NSW 10:00–11.00am	**Plenary 1: Capital vs revenue – Is the sun setting on Sun Newspapers?** The principles laid out by Dixon J in the *Sun Newspapers* case in 1938 have long been regarded as cornerstone principles in Australian taxation law for determining whether expenditure is on capital or revenue account. Recent cases suggest the Commissioner is rethinking whether that formula ought to be reconsidered or redefined. With many taxpayers incurring investment losses in the current environment, this is a "hot" issue. This session will: – Review the foundation principles from *Sun Newspapers* – Consider recent cases and rulings – Explore what constitutes a business – Discuss whether a one-off venture may be a profit-making undertaking on revenue account.	**Chloe Burnett, ATI** Sixth Floor of Selborne and Wentworth Chambers
	Morning tea **Qld 10.00–10.30am NSW 11.00–11.30am**	
QLD Qld 10.30–11.30am NSW 11.30am-12.30pm	**Plenary 2: No longer business as usual: Utilising tax losses** In the wake of devastating bushfires and a global pandemic, many businesses will have survived only through being agile, for example closing shopfronts, adapting their business models, providing different service offerings to its customers and perhaps taking on investors. Tax advisers will need to assist their clients in confirming any tax losses that have arisen and preserving losses for future tax planning. This session will cover: – A review of the continuity of ownership test – The same or similar business test, including the business continuity ruling – The impact of Div 35 for non-commercial losses – Practical planning opportunities.	**Stephen Holmes, CTA** WMS Chartered Accountants
F2F Qld 11.30am–12.00pm NSW 12.30–1.00pm	**Case study-facilitated discussion** This session will walk delegates through a practical case study taking into consideration the issues raised in Plenaries 1 and 2. The session will be facilitated by a local expert who will draw out key takeaways and provide delegates with the opportunity to raise questions and comments.	**Paul Banister, CTA (Qld)** Grant Thornton **Todd Want, CTA (NSW)** William Buck
	Lunch **Qld 12.00– 1.00pm NSW 1.00 – 2.00pm**	

Technical program

Day 1 – Thursday, 12 November 2020 continued

Time	Session	Presenter
QLD Qld 1.00–2.00pm NSW 2.00–3.00pm	**Plenary 3: Dividends and capital management into the twenties** All too often, tax practitioners focus on the risks around Div 7A deemed dividends and forget about the real traps that remain in the tax law concept of "dividend" itself. Present uncertainty around the notion of "profits", and the last gasps of the doctrine of maintenance of capital, mean that paying out a dividend without meaning to has significant franking account consequences. Addressing complexities of capital reductions and share buybacks poses further challenges including s 45B. This session will consider: – Corporations Act and tax law dividends – Profits or s 254T – or both? – Frankable distributions – Capital reduction or share buyback – what is the difference anyway?	**David Marks, QC, CTA** Queensland Bar
NSW Qld 2.00–3.00pm NSW 3.00–4.00pm	**Plenary 4: The pitfalls of particular financing arrangements** Private businesses and family investment structures often have a need for additional working capital. This may arise as a result of various environmental factors, an economic shock or other social and political forces. In its simplest form, an entity can obtain additional working capital by taking on debt or issuing more equity. This plenary will explore the risks associated with certain financial instruments and the refinancing of debt: – Debt/equity rules – Converting debt to equity – Funding from offshore – Foreign trusts – what are the funding risks?	**Mariana Von Lucken, CTA** HLB Mann Judd
F2F Qld 3.00–3.30pm NSW 4.00–4.30pm	**Case study-facilitated discussion** This session will walk delegates through a practical case study taking into consideration the issues raised in Plenaries 3 and 4. The session will be facilitated by a local expert who will draw out key takeaways and provide delegates with the opportunity to raise questions and comments.	**John Middleton, CTA (Qld)** Australian Taxation Office **Geoff Stein, CTA (NSW)** Brown Wright Stein Lawyers

Afternoon tea
Qld 3.30–4.00pm NSW 4.30–5.00pm

Technical program

Day 1 – Thursday, 12 November 2020 continued

Time	Session	Presenter
QLD Qld **4.00– 5.00pm** NSW **5.00–6.00pm**	**Plenary 5: Keeping it in the family – related party financing** At face value, funding options to/from related parties may appear to be simple. However, care needs to be taken to avoid creating both tax and asset protection risks for the group and family members. This session will examine issues associated with related party financing arrangements, including: – Managing loans to "at-risk" family members – Impact of family trust elections – Implications of assignment or forgiveness of related party loans.	**Sally Newman, CTA** Sally Newman Consulting
	Free time **Qld 5.00–7.00pm NSW 6.00–7.30pm**	
	Official Dinner **Qld 7.00–11.00pm Sofitel Noosa Pacific Resort** **NSW 7.30–11.30pm Seasalt Restaurant, Crowne Plaza Terrigal Pacific**	

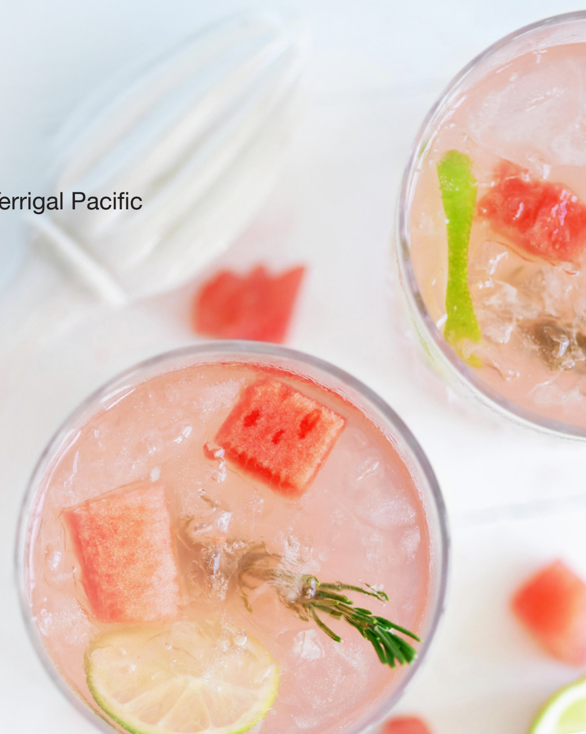
Official Dinner – Thursday, 12 November 2020

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

The official dinner will be held on Thursday, at both venues. Dinner and drinks will be served poolside at the Sofitel Noosa Pacific Resort, with their menu featuring fresh produce, and both local and seasonal ingredients.

At the Crowne Plaza Terrigal Pacific, delegates can expect spectacular views over Terrigal Beach at the Seasalt Restaurant, which is known for their fresh seasonal menus with a coastal influence. The official dinner is included in the event registration fee for delegates. Please indicate your requirements, including dietary requirements, on the registration form. We hope you will join us for an enjoyable evening.

	QLD	NSW
Time:	7.00–11.00pm	7.30–11.30pm
Venue:	Sofitel Noosa Pacific Resort	Seasalt Restaurant, Crowne Plaza Terrigal Pacific
Price:	Included for full registration delegates	
Dress:	Smart casual attire	



Technical program

Day 2 – Friday, 13 November 2020

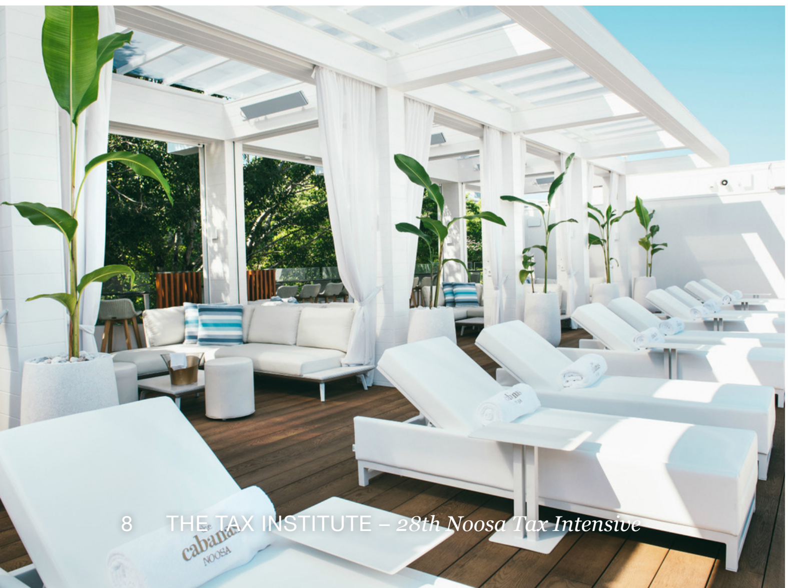
Time	Session	Presenter
NSW Qld 8.00–8.50am NSW 9.00–9.50am	**Plenary 6: Asset protection: hard to make, easy to lose** COVID-19 has been a reminder to us all of how quickly things can change and that events outside our control can have devastating effects on businesses and the value of assets. It is therefore very timely to revisit how businesses and assets are structured and whether these are exposed if things go wrong. This session will include: – What and who do we need protection from? – Identifying who is a risk – Identifying what is at risk if things go wrong – Structuring to provide clients with the ultimate protection.	**Andy Milidoni, CTA** Johnson Winter & Slattery
NSW Qld 8.50–10.00am NSW 9.50–11.00am	**Plenary 7: ATO update and hot spots** With the tax landscape changing so significantly in the last 12 months, this session will be covering the major areas of focus for the ATO in the private groups market, including: – The Top 500 private groups tax performance program, and other supporting compliance programs being undertaken in the private groups market – The impact of recent litigation relating to the revenue/capital distinction and capital gains made by trusts – The current state of issues relating to Div 7A, s 100A and professional firms from a tax administration perspective.	**Tim Dyce and Karen Rooke, CTA** Australian Taxation Office Facilitator: **Geoff Stein, CTA** Brown Wright Stein Lawyers
	Morning tea **Qld 10.00–10.30am NSW 11.00–11.30am**	
F2F Qld 10.30–12.30pm NSW 11.30am–1.30pm	**Breakout workshop: Tax governance and asset protection** The breakout workshop, in building on the case study-facilitated discussions, will address tax governance issues generally and related party financing and asset protection issues in particular, including the importance of getting things right at the front end before it is too late. In doing this, aspects covered will be: – Identifying what is at risk – Strategies to protect assets of "at-risk" entities and individuals – Why documentation matters and journal entries just don't cut it – What is required to effectively register security interests over assets on the PPSR.	Workshop coordinator: **Kim Reynolds, CTA** Vincents **Linda Tapiolas, CTA** Cooper Grace Ward Lawyers Qld Workshop leaders: **David Hughes, CTA** McCullough Robertson **Kim Reynolds, CTA** Vincents **Ash Chotai, CTA** Chotais Chartered Accountants **Linda Tapiolas, CTA** Cooper Grace Ward Lawyers NSW Workshop leaders: **Martin Booth, CTA** Pitcher Partners **Rachel Vijayaraj, CTA** Brown Wright Stein Lawyers **Jennifer Cameron, CTA** Deloitte **Dung Lam, CTA** Coleman Greig Lawyers

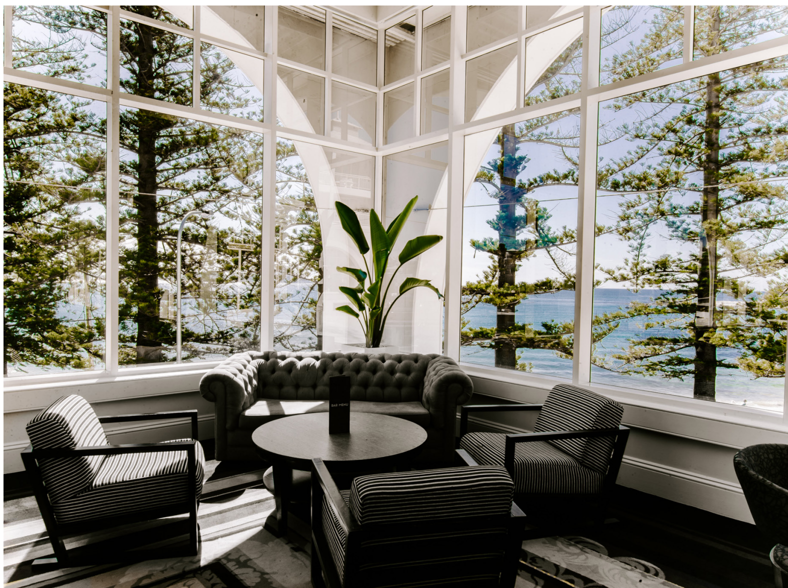
Technical program

Day 2 – Friday, 13 November 2020 continued

Time	Session	Presenter
	Lunch **Qld 12.30 – 1.30pm NSW 1.30 – 2.30pm**	
QLD **Qld** **1.30 – 3.00pm** **NSW** **2.30 – 4.00pm**	**Closing panel workshop: The "right" way to manage a trust: Trustee vs beneficiaries vs accountant vs lawyers** This facilitated panel session will examine practical issues faced in managing family trusts from multiple perspectives. In Australia, there are hundreds of thousands of discretionary family trusts conducting a range of activities, from holding assets through to operating businesses. Tough times lead to greater scrutiny, and family interests often lead to friction. Our panel will look at the risks and provide views on how to manage the administration of family trusts, including: – Disputes with beneficiaries – Trustee removal and appointment – What is a "proper" trustee decision-making process? – Documenting reasons and risks of getting it "wrong" – Do you have the power? – Does the paperwork reflect the facts and intentions? – Succession planning for trusts.	Panelists **Linda Farmer, CTA** Grant Thornton **John Ioannou, CTA** Deloitte Private **David Marks, QC, CTA** Queensland Bar Facilitator **Emma Woolley, CTA** Hall & Wilcox Lawyers
	Closing drinks **Qld 3.00 – 3.30pm NSW 4.00 – 4.30pm**	

> *"I've attended and led workshops at the annual Noosa Tax Intensive and for me it is a not to be missed event! The calibre of the program, speakers and unique workshop based program ensures you are completely immersed and gain a deeper understanding and insight."*
>
> Hannah Soh, CTA, Ernst & Young





Presenter profiles

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. He is a contributing author to Thomson Reuter's *Financial Planning Handbook*. Paul is a National Councillor and was also the recipient of The Tax Institute's SME Tax Adviser of the Year Award for 2016.

Chloe Burnett, ATI, practises in commercial, regulatory and public law, with a specialisation in tax law. She specialises in international tax and statutory interpretation and is an active member of the International Fiscal Association. Chloe appeared in the *Chevron* transfer pricing case, the *News Australia Holdings* and *Citigroup* Part IVA cases, the *Consolidated Media Holdings* and *Cable & Wireless* buyback cases, and other significant disputes. Chloe is a member of Sixth Floor Selborne/ Wentworth Chambers. Before joining the Bar, she practised as a solicitor at Allens. She also worked for Macquarie Bank in Sydney and Slaughter & May in London. Chloe teaches the Tax Litigation and Statutory Interpretation courses in the Sydney Law School LLM program.

Professor Justin Craig is Professor of Entrepreneurship and Family Enterprise at the Bond University Business School. Dr Craig's research focuses on the strategy, function, management, and performance of multi-generational family enterprises and those who lead and steward them. He has held faculty positions at the Kellogg School of Management at Northwestern University in Chicago, where he remains a Visiting Professor of Family Enterprise, Northeastern University in Boston, and Oregon State University. Dr Craig completed undergraduate degrees in Business and Psychology (with Honors) at Griffith University, a Master's in Counseling and a PhD in Behavioral Science at Bond University.

Tim Dyce is the Deputy Commissioner for Private Wealth. Tim was appointed as a Deputy Commissioner in 2006 following a long and established career in the ATO. Having held senior leadership roles in a number of business lines, including Income Tax, Aggressive Tax Planning and Indirect Taxes (GST and Excise), Tim has extensive experience in taxation administration. Drawing on this experience, Tim is an active and influential contributor to various internal and external committees and forums that shape the Client Experience for Not for Profit entities, Excise entities and Private Groups. Ultimately, Tim has national responsibility for the willing participation and voluntary compliance of private groups and high wealth individuals in Australia. To achieve this outcome, he is focused on implementing contemporary client engagement strategies, which seek to provide tailored, real time services.

Linda Farmer, CTA, is a Director in the Private Advisory area of Grant Thornton, providing advice to high net worth individuals, their businesses and investment entities, including self-managed superannuation funds, focusing on estate and successful planning.

Stephen Holmes, CTA, is a Partner at WMS Chartered Accountants based on the Gold Coast. Stephen has a particular focus on CGT, taxation implications of trusts and SME tax issues generally. He is a regular resource for other accounting professionals on tax matters. He is also a regular speaker on tax matters across south-east Queensland and northern New South Wales. In addition to holding Masters degrees in both Taxation and Economics, Stephen holds a Juris Doctor degree from Bond University Law School with first class honours.

John Ioannou, CTA, was admitted as a solicitor in 2002 and is a Partner at Deloitte Private. He has experience in the areas of taxation, structuring, trusts and estates, succession and asset protection planning. John has a Bachelor of Arts, Bachelor of Laws and a Masters of Law. He is currently Queensland's representative on The Tax Institute's National Professional Development Committee and chair of Queensland's State Council.

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. David serves on the disciplinary panel of an international practitioner association.

John Middleton, CTA, is part of the ATO's Tax Counsel Network, where he works on complex technical advice, tax reform projects, and strategic litigation. Prior to this, he had over 20 years in the private sector as Special Counsel at Clayton Utz Brisbane specialising in revenue and commercial law. He practised in CGT, stamp duty, GST and general tax. While in private practice he was listed in Doyle's and Best Lawyers in respect of tax matters.

Andy Milidoni, CTA, specialises in all aspects of taxation, revenue law and trust law and some aspects of superannuation law. He advises both public and private corporate groups, SMEs and high wealth individuals across industry sectors and in a range of income tax, international tax, GST, duty, payroll tax, land tax and SGC matters and both in a contentious and non-contentious context. Andy also works closely with a range of intermediaries such as accountants, business and corporate advisors, liquidators, financial planners and court appointed trustees and guardians.

Sally Newman, CTA, is the Principal of Sally Newman Consulting. Sally's practice focuses on GST, stamp duty and other state taxes and she advises SMEs and high wealth including in respect of trusts and estates, restructuring and asset and business sales. Sally also helps clients resolve tax disputes. Prior to starting her own firm in 2018, Sally worked for over 12 years in MinterEllison's Brisbane tax team.

Karen Rooke, CTA, is an Assistant Commissioner in the Tax Counsel Network in the Australian Taxation Office. Her principal focus is the private groups/ SME market. She has been a member of the Tax Institute for more than 30 years and has presented at a number of Institute events over the years.

Geoff Stein, CTA, is a partner of Brown Wright Stein Lawyers. Geoff has been a lawyer in Sydney for over 25 years, specialising in commercial and tax law. He is one of only a few New South Wales Law Society Accredited Specialists in taxation law. He works extensively with many accounting firms to assist their clients and gains great satisfaction knowing he is also helping them build

Presenter profiles continued

their practices. Geoff advises clients on tax, trust law, estate planning, and general commercial issues. He has developed an in-depth understanding of the legal challenges faced by business owners.

Mariana Von Lucken, CTA, is a Tax Partner with HLB Mann Judd, and has advised a wide range of clients on a wide range of income tax, GST, FBT, international issues, payroll and R&D issues. It is important to her to give back to the profession – she is involved in The Tax Institute's Professional Development and Women in Tax committees.

Todd Want, CTA, is a Director at William Buck and brings over 15 years of experience to his role in the Tax Services division. Todd specialises in small-to-medium enterprise tax matters and advises clients on a broad range of tax issues such as CGT, advice relating to structuring and restructuring, the tax consequences of acquisitions and divestments, small business CGT concessions, Div 7A, property matters, taxation of trusts and tax risk management.

Emma Woolley, CTA, of Hall & Wilcox Lawyers has extensive experience in advising clients in estate planning and estate administration, trust establishment and ongoing administration, trust estate disputes, and structuring for succession of ownership and control of private and family businesses. She leads Hall & Wilcox Lawyers' Private Client practice. Emma's clients include high net worth individuals, families and privately held businesses.

WORKSHOP COORDINATORS

Kim Reynolds, CTA, is a Chartered Accountant, Chartered Tax Adviser and Director at Vincents. Kim has over 25 years' experience working with SME's, family groups and high net worth individuals helping them navigate tax issues impacting on their affairs. Kim's expertise includes complex income tax and CGT issues including Division 7A and CGT Small Business Concessions, taxation of trusts, succession and estate planning, and transaction advice and support. Kim is a member of The Tax Institute's Queensland State Council & Chair of the Queensland PD Committee.

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.

WORKSHOP LEADERS

Qld

Ash Chotai, CTA, is a Director with Chotais Chartered Accountants in Brisbane and has in excess of 25 years experience in the provision of tax and business advice to small and medium enterprises and high net wealth persons. His areas of interest include business and asset structuring, asset protection and estate planning. Ash is a former Queensland State Chairman and State Councillor of The Tax Institute, and a former member of the National Education Committee, and is a regular presenter for The Tax Institute and other professional bodies.

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

Kim Reynolds, CTA, refer to 'Workshop Coordinators'.

Linda Tapiolas, CTA, refer to 'Workshop Coordinators'.

NSW

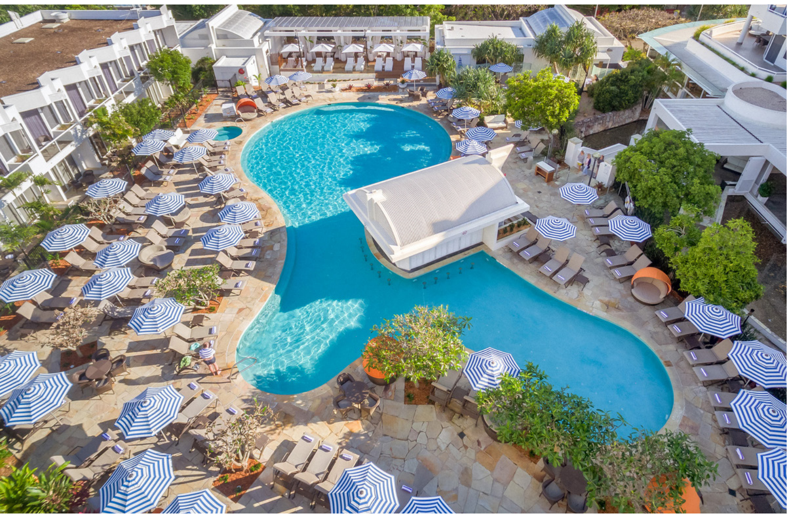
Martin Booth, CTA, is a Partner within the Private Business and Family Advisory division of Pitcher Partners. With over 20 years of professionally accredited employment, he is a highly experienced taxation and business adviser with strong technical and business qualifications, and has consistently demonstrated the ability to provide tax-effective solutions to clients in a variety of competitive industries. He focuses predominantly on providing tax advisory services to clients in the SME market. He has extensive experience in advising clients in the property and construction and financial services industries. Martin regularly assists in negotiations with the ATO in resolving technical taxation disputes. He has over 15 years experience advising clients in dispute resolution and has been instrumental in achieving appropriate outcomes for uncertain matters.

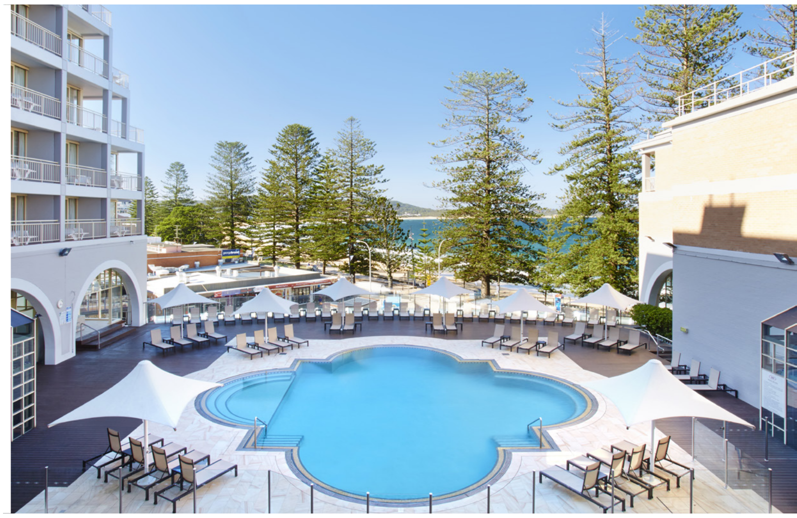
Rachel Vijayaraj, CTA, is a senior associate at Brown Wright Stein Lawyers, with a broad practice advising individuals and SME owners on tax, commercial, trust, estate planning, estate disputes and family provision matters. Rachel values forming meaningful relationships with clients and providing advice in collaboration with their accountants on their personal, business and tax affairs. Rachel has guided clients in dealing with the ATO on audits, objections, voluntary disclosures and early engagement. Rachel also heads up the not-for-profit practice at Brown Wright Stein.

Jennifer Cameron, CTA, is a Chartered Accountant and a Partner at Deloitte Private. Jen has over 17 years' experience with providing tax consulting, compliance and advisory services to a range of public and large private companies across a broad range of industries. This includes providing technical advice on complex tax matters, structuring advice and transaction advisory and support. Jen values forming deep relationships with her clients and collaborating and working alongside other tax specialists within Deloitte to ensure her clients tax matters are appropriately addressed.

Dung Lam, CTA, is a Special Counsel at Coleman Greig 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 self-managed superannuation funds arena and tax issues related to estate planning. Dung is a Chartered Tax Adviser, full member of the Society of Trusts and Estate Practitioners, an accredited Specialist in Business and Personal Tax with the NSW Law Society, a member of the Business Law Section Taxation Committee of the Law Council of Australia and a member of the NSW Law Society Liaison Committee with the Revenue NSW. 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.

Venues and accommodation





Venues

1 Sofitel Noosa Pacific Resort

14–16 Hastings Street, Noosa Heads Qld 4567

The Sofitel Noosa Pacific Resort is in the heart of Noosa, on cosmopolitan Hastings Street, across from Noosa Main Beach and overlooking Laguna Bay and the natural beauty of Noosa River. The Sofitel Noosa Pacific Resort offers the quintessential five-star Noosa experience, from the luxurious AQUA Day Spa through to a full range of leisure activities including golf and tennis. The very spacious, self-contained guest rooms come complete with private balconies and spa baths.

Getting there

The Sofitel Noosa Pacific Resort is approximately a two-hour drive from Brisbane Airport or 40 minutes drive from Sunshine Coast Airport.

Parking

Car parking is $25 per day for self-parking or $35 per day for valet parking at the Sofitel Noosa Pacific Resort.

2 Crowne Plaza Terrigal

Pine Tree Ln, Terrigal NSW 2260

Situated in a beautiful beachside location just 90 minutes' drive north of Sydney, the iconic Crowne Plaza Terrigal Pacific is a hotel experience like no other. Located in the heart of Terrigal village, everything is in easy reach - stroll along the beach to Terrigal Haven, walk up The Skillion for breathtaking views or explore the dozens of cafés, restaurants and boutique shops on your doorstep.

Getting there

Crowne Plaza Terrigal is just 90 minutes' drive from Sydney CBD or Sydney Airport.

Parking

Valet parking is available for a daily fee of $35.00 or self-parking is available for a daily fee of $25.00 at the Crowne Plaza Terrigal.

Accommodation

Favourable room rates have been negotiated and secured at the Sofitel Noosa Pacific Resort and Crowne Plaza Terrigal. Accommodation bookings can be made through our accommodation and travel provider, Accomodation Link, by following the link on the event web page (taxinstitute.com.au/noosa20).

Please note: The conference rates will be available until Friday, October 9th 2020. After this date we cannot guarantee the same rate nor availability at the hotel.

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

Event information

Registration options and inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Event lunches	Official dinner*	How to register
Full registration This registration option entitles one delegate to attend the entire event – participation in the two-day technical program (including workshops).	✔	✔	✔	Register online or complete the form included in this brochure.

*Additional tickets to the event dinner can be purchased on the registration form.

Register online at taxinstitute.com.au/NTI

Discounts

Early bird registration

All registrations received and paid on or before Friday 25 September will be entitled to the early bird discount.

CPD accreditation

Attendance at the event counts for 12 hours Continuing Professional Development Accreditation with The Tax Institute.

Confirmation of registration

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

Paperless materials

The Tax Institute understands the impact that an event of this nature has on the environment, especially when printing delegate materials. Full technical papers and PowerPoint presentations will be available online only to all participating delegates approximately 14 days before the event. Once these are available, an email will be sent to delegates with access details.

The Tax Institute CPD event app

Program information, materials (technical papers and slides), evaluation forms and more will be available via The Tax Institute's event app. All delegates are encouraged to download the app on their phone or tablet prior to the event. Materials will be made available for download approximately 14 days prior to the event. At this time, an email will be sent to delegates with access details. Please also refer to 'Pre-reading requirements'.

Pre-reading requirements

The value of the workshop component of the event is maximised for delegates when preparation for, and participation in, the workshop case studies are undertaken. For this purpose, workshop materials and suggested readings are made available on the event app (see above) to delegates approximately 14 days prior to the event via email. Please ensure your email address is correct on the registration form.

Delegate list

A delegate list will be included on the event app to assist with networking. Please indicate on the registration form if you do not want your name included on the list.

Dress code

Smart casual attire is suitable for the duration of the event program including the official dinner.

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 event. A replacement may be nominated; however, the replacement is only valid for the 28th Noosa Tax Intensive. As this is a member only event, the replacement will be required to apply for membership. To learn more about membership and to join visit: **info.taxinstitute.com.au/membership**. 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.

For further information regarding this event, please contact the Event Team on +61 7 3225 5200 or email **qld@taxinstitute.com.au**

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

THE TAX INSTITUTE

28th Noosa Tax Intensive
Registration form

41131 / 41175 | 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

I will be attending the event in:

☐ Qld – Sofitel Noosa Pacific Resort (41131)

☐ NSW – Crowne Plaza Terrigal (41175)

	Member
Early bird registration Received on or before 25 September 2020	☐ $1,950
Standard registration Received after 25 September 2020	☐ $2,150

Member Only Event

To learn more about membership and to join visit: **info.taxinstitute.com.au/membership** or call **1300 829 338.**

T&Cs apply. Current annual membership is required to register. Excludes promotional, deferred or instalment memberships.

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

Dietary requirements:

Promotional code:

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)

Date of birth: DD/MM/YYYY

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.

3 Official Dinner

The Official Dinner is INCLUDED in the registration fee for delegates attending the full event.

Thursday 12 November:

☐ Yes, **I WILL** be attending the event dinner **OR**

☐ No, **I WILL NOT** be attending the event dinner

Names and dietary requirements:

4 Payment summary

Registration fee	$
Additional guest tickets – Official Dinner ($185 each)	$
Total payable	$

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

5 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: MM/YY 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 the Event Team on 07 3225 5200 or email qld@taxinstitute.com.au.
For registration enquiries, please contact customeradmin@taxinstitute.com.au.

Collection notice

TO REGISTER

Online taxinstitute.com.au/NTI

Mail PO Box 7071, Riverside Centre, Brisbane, Qld, 4001

Email customeradmin@taxinstitute.com.au

Fax 07 3225 5222

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insights.taxinstitute.com.au

THE TAX INSTITUTE

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North Sydney NSW 2060

Tel 02 8223 0000
Fax 02 8223 0077

For information, please contact
Event Team at qld@taxinstitute.com.au

taxinstitute.com.au

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