



THE TAX INSTITUTE



2021 Private Business Tax Retreat

25–26 February 2021 | Palazzo Versace Gold Coast

12 CPD hours

Welcome

2021 – A fresh new decade – new thinking, new ideas

On behalf of the organising committee, I am delighted to extend an invitation to you to attend the 2021 Private Business Tax Retreat to be held at the Palazzo Versace Hotel on the Gold Coast.

Since the Organising Committee agreed to the final program, our once-familiar world is almost unrecognisable. Heightened awareness has forced us all to re-examine our personal and professional routines, in respect of our everyday lives and interactions. With the unrepresented economic disruption that is still very much in front of us at the time of writing, now more than ever we will be relied on as advisers to continue to pre-empt challenges and guide our clients.

Many practitioners are renowned for doing things the way they've always done them but with the world changing almost under our feet, this retreat will be the time to reflect and recalibrate. This retreat has been designed to address a variety of new issues that may not be gaining enough visibility in an adviser's day to day practice. In doing so, and potentially in an economic environment that is favourable to restructuring, it will also traverse strategies to deal with any necessary changes.

Why you should attend

Now celebrating our 10th anniversary, the Private Business Tax Retreat is a significant event on The Tax Institute's calendar and one where we welcome new delegates to join those who have become long-standing attendees. This intensive event is like no other in the market and is focused on providing senior private client advisers with an opportunity to immerse themselves in contemporary tax issues that directly affect their clients.

For the first time also, we will be offering this event in a hybrid format to ensure we reach all interested delegates in this current environment.

Whether you are watching from our amazing venue on the Gold Coast, or viewing from the comfort of your home or office, you will experience the same expert-driven program that has brought delegates from around the country year in and year out.

Thank you

Thank you to those who have previously provided feedback which in turn has strongly influenced this year's program. The feedback from regular attendees helps us plan for both this and future events as we continue to strive to make this retreat a compelling one to attend for private client advisers.

A special thank you also to the organising committee for the time, energy and support they have contributed to ensuring that the 2021 Private Business Tax Retreat maintains the high standards of similar events over the years in Queensland.

I look forward to meeting you on the Gold Coast for what will be a truly exceptional retreat style event in the wonderful surrounds of the Palazzo Versace.



Dominic Moon, ATI
Chair, 2021 Private Business Tax Retreat

The Tax Institute gratefully acknowledges the generous assistance of members of the 2021 Private Business Tax Retreat Organising Committee:

Dominic Moon, ATI, Macpherson Kelley
(Chair PBTR Organising Committee)

Linda Farmer, CTA, Grant Thornton

Steven Lutz, CTA, Lutz & Associates

Melinda Peters, CTA, McCullough Robertson

Jacqui Reeves, CTA, BusinessDEPOT

Frederick Mahar, CTA, FM Mahar and Associates

Early bird offer – Register on or before 22 January 2021

Technical program

Day 1 – Thursday, 25 February 2021

Time	Session	Presenter(s)
8.00am	Registration	Pre-function foyer
8.30–8.45am	Official opening by retreat chair	Dominic Moon, ATI Chair, 2021 Private Business Tax Retreat
8.45–9.00am	President's welcome	Peter Godber, CTA President – The Tax Institute
9.00–10.00am	<p>Session 1 – Keynote Address: The post COVID economy</p> <p>COVID 19 has plunged Australia into its first economic recession in three decades. While this was not unexpected after the scale of the national shutdown in March, what is much less certain is the nature and timing of a recovery.</p> <p>Nicki Hutley, a Senior Partner with Deloitte Access Economics, a frequent economic commentator in the media and a regular television guest on both The Drum and The Project, will offer her insights on what a recovery might look like including:</p> <ul style="list-style-type: none"> – Is it likely to get worse before it gets better? – How long could a recovery to pre-COVID 19 activity take? – What has changed forever and are there any lasting positives we can expect to arise out of this experience? 	Nicki Hutley Deloitte
10.00–10.15am	Morning tea	Pre-function foyer
10.15–11.15am	<p>Session 2 – Re-thinking business structuring</p> <p>It's always useful to stop and consider where we have been before we look at where we are going. This plenary is intended as a scene setter for Plenaries 2 to 6, introducing the issues that are driving business structuring choices now and into the future and the context for those issues. It will define the scope of the day before we deep dive into:</p> <ul style="list-style-type: none"> – Division 7A – Small business CGT concessions – Relevant trust issues – Company versus trust comparisons and issues – Business restructuring 	Mark West, CTA West Garbutt Pty Ltd
11.15am–12.15pm	<p>Session 3 – Dealing with the Division 7A dilemma</p> <p>It's been almost ten years since the government first committed to reviewing, simplifying and clarifying Division 7A to improve its operation. But delays and multiple postponements of the commencement of the proposed changes to Division 7A have made it almost impossible for practitioners to advise clients with any certainty. While we continue to speculate on the nature of the proposed changes, we must plan for and manage clients' Division 7A issues in a time of continuing uncertainty and change.</p> <p>This session will provide strategies to minimise any Division 7A exposures and will focus on the following:</p> <ul style="list-style-type: none"> – What is the current state of play? – Opportunities and risks arising from COVID-19 – Perennial Division 7A sleeper issues – Dealing with historical nightmares – Correction options when it all goes wrong 	Linda Farmer, CTA Grant Thornton

Technical program continued

Day 1 – Thursday, 25 February 2021 continued

Time	Session	Presenter(s)
12.15–1.00pm	Lunch – Ill Barocco Restaurant	
1.00–2.00pm	<p>Session 4 – Small business CGT concessions – Making sense of the new rules affecting shares and units</p> <p>The benefits of the small business CGT concessions can be moderated by the compliance costs and complexities associated with determining eligibility for the concessions, particularly in light of the 2018 amendments which affect shares in companies and interests in unit trusts. Indeed, tax relief previously accessible under the old law may no longer be available under the new rules.</p> <p>This practical session will consider the operation of the new rules as they apply to sales of shares and units, including:</p> <ul style="list-style-type: none">– The additional conditions which are now required to be satisfied, including how they apply to “later entities”– How the choice of legal structure can affect the availability of the concessions– Some traps for the unwary– The special rules which apply when seeking to use the small business roll-over in Subdivision 152-E to acquire shares or units as a replacement active asset– Downturn in turnover and reduction in valuation issues– Case study/ies with numbers – deep dive with legislation, rulings (if any) and numbers to work through the problem – merging the study into the presentation with a mix of numerical mini examples.	<p>Linda Tapiolas, CTA Cooper Grace Ward Lawyers</p>
2.00–3.00pm	<p>Session 5 – Trust sleepers</p> <p>With trusts always an ongoing area of focus for the ATO and relevance to advisers, this session is designed to provide insight into those ‘trust sleepers’ that we should all be aware of. This session will provide an overview of three key issues in the current environment and seek to provide advisers with practical tips for the management and mitigation of risks in relation to each issue. In particular, this plenary session will cover:</p> <ul style="list-style-type: none">– The current landscape in relation to section 100A– Housekeeping – what to do if you are still distributing under an “ordinary family arrangement” where is the line likely to be?– When section 99B applies and what you should be aware of– A consideration of the Commissioner’s current position in relation to Division 855, non-resident beneficiaries and non-fixed trusts	<p>Justin Byrne, CTA Queensland Bar</p>

“ Having attended almost every PBTR, I find it is one of the few events that consistently gives me the right perspectives, on the right topics and the opportunity to connect with my peers.

I don’t expect 2021 to be any different.”

John Ioannou, CTA, Macpherson Kelley

Technical program continued

Day 1 – Thursday, 25 February 2021 continued

Time	Session	Presenter(s)
3.00–3.15pm	Afternoon tea	Pre-function foyer
3.15–4.15pm	Session 6 – Trust versus company: Analysis for the new decade This session will build on the sessions from earlier in the day that have provided a deeper analysis of common tax issues for both trust and company structures. In this Plenary session, we will provide case study examples focusing on the key individual drivers between choosing a trust or company structure, including the following: <ul style="list-style-type: none">– Availability of the CGT discount versus the lower corporate tax rate– Division 7A issues in respect of unpaid present entitlements and loans– Investments and funding outcomes using different structures– Loss of debt/equity interests in related parties and tax effects	Thomas Tulley, CTA EY Catherine Parkinson EY
4.15–5.15pm	Session 7 – Transitioning between trust and company Following our earlier sessions and having regard to the current tax landscape, it may become apparent to many businesses that their structure is no longer optimal. This session will look at the taxation and duty issues that arise in transitioning from a trust to a company and vice versa, including: <ul style="list-style-type: none">– managing CGT with rollovers (outside of the small business CGT concessions)– cleaning up historical Division 7A issues– addressing State duty on the transfer of business assets and land (Queensland and NSW)– the pros and cons of alternate solutions– revisiting SBC eligibility	Dominic Moon, ATI Macpherson Kelley Tom Walrut, FTI Merthyr Law
5.15–6.30pm	Free time	
6.30–7.00pm	Pre-dinner drinks	
7.00–11.00pm	Official dinner	

Official Dinner – Thursday, 25 February 2021

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

The Official Dinner will be held on Thursday, at Vanitas Restaurant. The menu features fresh, locally sourced ingredients in an Italian family style three course dinner.

We hope you will join us for an enjoyable evening.

Time: 7.00–11.00pm

Price: \$150 for full registration delegates. Additional tickets can be purchased – see registration form for details

Dress: Business casual attire



Technical program continued

Day 2 – Friday, 26 February 2021

Time	Session	Presenter(s)
9.00–10.00am	<p>Session 8 – Thought leadership – Leading the charge on tax reform</p> <p>The Tax Institute is well-placed to influence the design of tax policy and tax administration through its policy and advocacy activities and Thought Leadership.</p> <p>In this innovative session, Peter and Robyn will discuss:</p> <ul style="list-style-type: none"> – The Institute’s current tax policy and advocacy activities – The key tax reform issues identified during the Institute’s recent The Tax Summit: Project Reform event series – The Institute’s final position paper which was submitted to government – A range of tax policies, both existing and proposed, that are relevant to private clients, and how our tax system could be improved for all stakeholders. <p>In this interactive session — which will explain why The Tax Institute is advocating particular positions on tax policy and administration and the key considerations that may not be immediately apparent to busy advisers — you will have the opportunity to ask questions and engage in the discussion. Consider the why in the context of current tax reform?</p>	<p>Peter Godber, CTA President, The Tax Institute</p> <p>Robyn Jacobson, CTA The Tax Institute</p>
10.00–10.15am	Morning tea	Pre-function foyer
10.15–11.15am	<p>Session 9 – Managing the superannuation guarantee minefield</p> <p>The Superannuation Guarantee Amnesty period flew by during the COVID-19 lockdowns with many taxpayers missing the opportunity to utilise the amnesty. However, the Amnesty has revealed how easy it is for employers to have a shortfall in their SGC obligations even where they have done their best to complying with the laws. With the ATO having unprecedented access to data to identify and target shortfalls, now is the time for all taxpayers to review their SGC compliance and put in place safeguards to prevent shortfalls in their SGC obligations.</p> <p>This session will cover:</p> <ul style="list-style-type: none"> – who is an employee for SGC purposes? – when is a contractor working under a contract that is wholly or principally for their labour – safeguards to reduce risk of shortfalls – managing the clearing house timing issue – identifying shortfalls and offsetting payments 	<p>Neal Dallas, CTA McInnes Wilson</p>
11.15am–12.15pm	<p>Session 10 – Dodging the property ownership landmines</p> <p>The great Australian dream of owning property is now strewn with even more tax landmines at both the Federal and State level. Overlaid by the perennial headache of the revenue versus capital distinction, property owners increasingly have to navigate their way through the tax minefield which takes the form of continual legislative change aimed solely at their landholdings, pertinent case law and draft ATO guidance.</p> <p>This session will consider strategies to safely manage the following risk areas:</p> <ul style="list-style-type: none"> – Subdividing, ‘flipping’, mere realisation, change of purpose – Revenue v capital dichotomy – The recently enacted vacant land changes that deny deductions for holding costs – The recently enacted main residence exemption changes affecting non-residents – Recent developments impacting on the active asset test in the small business CGT concessions 	<p>Thomas Aitkenhead Hoffman Kelly</p>

Technical program continued

Day 2 – Friday, 26 February 2021 continued

Time	Session	Presenter(s)
12.15–1.15pm	Lunch – Ill Barocco Restaurant	
1.15–2.15pm	<p>Session 11 – The ATO experience</p> <p>With increased ATO focus on Private Wealth and Private Family groups comes an expectation of increased compliance and audit activity. Recent changes have seen the advent of a number of programs designed to improve taxpayer engagement and compliance. However, as the culture within the ATO continues to evolve, so too does their approach in dealing with taxpayers and their advisers.</p> <p>This session will provide practical insights into the avenues available in managing a tax dispute – from audit and objection to appeal, including:</p> <ul style="list-style-type: none"> – the options now available to taxpayers involved in a potential dispute and how these can best be used to improve outcomes for your clients – looking at your client from the Commissioner’s perspective – practical insights into current experiences in the dispute space 	<p>Melinda Peters, CTA McCullough Robertson</p>
2.15–2.30pm	Afternoon tea	Pre-Function Foyer
2.30–3.30pm	<p>Session 12 – Panel session – The dust has settled but where to from here?</p> <p>In this lively punchy session, our panel of expert presenters will each discuss hot topics of relevance to private clients. Now that the dust has settled on these three issues which have been affected by recent legislative changes and judicial guidance, practitioners are better placed to advise on these matters.</p> <ol style="list-style-type: none"> 1. ATO Justified Trust program – with the extension of the Justified Trust program to the “Next 5,000”, more SME clients will now be actively engaged with the ATO to ensure they are reporting the right amount of tax. This part of the session will consider: <ul style="list-style-type: none"> – What the Next 5,000 can expect in their ATO interactions – Why it’s necessary to examine your client’s tax affairs through a new lens – How to support your client through the program – Recent experiences with the ATO 2. Base rate entity passive income from 1 July 2017 – The dust has finally settled on the saga that was the reduction of the corporate tax rate with an enacted legislative framework. But issues remain in relation to the determination of base rate entity passive income which is necessary to calculate a company’s corporate tax rate and franking rate. This part of the session will examine: <ul style="list-style-type: none"> – What constitutes BREPI – What interpretation issues arise from the ATO’s final ruling LCR 2019/5, including for non-portfolio dividends and rent versus royalties – The franking implications of having too much or too little passive income 3. The 2019 residency decision in Harding provided clarity on the ordinary meaning of “resides”, and raised some issues relating to the “permanent place of abode” test. The decision has impacted on a number of other more recent residency cases which were waiting on the Full Federal Court’s decision. This part of the session will look at: <ul style="list-style-type: none"> – Harding – what was decided? – the effect Harding has had on more recent residency cases – what this decision means in a world of decreased mobility – when being stuck in Australia might result in a change in tax status (and the Commissioner’s guidance in this regard). 	<p>Panelists</p> <p>Paul Banister, CTA Grant Thornton</p> <p>Jacqui Reeves, CTA BusinessDEPOT</p> <p>Fletch Heinemann, CTA Cooper Grace Ward Lawyers</p> <p>Facilitator:</p> <p>Dominic Moon, ATI Macpherson Kelley</p>
3.30–4.00pm	Retreat close	<p>Dominic Moon, ATI Chair, 2021 Private Business Tax Retreat</p>



Presenter profiles

Thomas Aitkenhead, is a Chartered Accountant and Director at Hoffman Kelly. Tom has degrees in Commerce and Law and has over 17 years' experience in public practice providing structuring and taxation solutions for SME businesses. Tom has a special interest in the property industry and its ever-changing and complex nature. He enjoys finding practical solutions for his clients.

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.

Justin Byrne, CTA, recently went to the Queensland Bar after 20 years practising as a solicitor specialising in taxation and revenue law. He advises on a wide range of complex taxation issues, including income tax, CGT, GST and stamp duty. With qualifications and extensive experience in both law and accounting, he is uniquely placed to provide practical and commercial tax solutions for a range of clients, from individuals and small business owners to large corporations and government. He is also experienced in negotiating with the ATO in relation to tax disputes and has conducted tax litigation in the Administrative Appeals Tribunal, Federal Court and High Court.

Neal Dallas, CTA is a Principal in McInnes Wilson Lawyers' Superannuation and Revenue Group. He has extensive experience advising clients in the areas of superannuation, tax, estate planning and asset protection. He has

advised corporate, industry and self-managed funds, their employers and members across a range of superannuation-related matters including fund establishment, fund mergers and transfers, benefit payment issues, superannuation borrowing arrangements, taxation of contributions and earnings, fund wind-ups and trustee training. Neal is listed in Best Lawyers Australia for Superannuation Law, Tax Law, Trusts and Estates, Wealth Management/Succession Planning Practice.

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.

Peter Godber, CTA, is currently President of The Tax Institute. Peter was a consultant to Grant Thornton. He has over 30 years experience in giving professional taxation advice and dealing with change to Australian tax laws. Peter provides advice in many areas of taxation, including business taxation, business and investment structuring, international tax planning, prudential tax audits and tax risk management.

Fletch Heinemann, CTA, is a partner in Cooper Grace Ward Lawyers' commercial team. Fletch specialises in tax and customs disputes. His experience includes helping clients with private rulings, audits, objections and litigation. He also assists clients by providing tax advice across a range of commercial issues. Fletch has also presented sessions at The Tax Institute's Queensland seminars and national conferences and has published papers on topical tax and customs issues.

Nicki Hutley is a highly experienced economist, with broad-based expertise gained over three decades of practice in financial and investment markets and in consulting. She is a senior partner with Deloitte Access Economics, and is particularly interested in the intersection of economy, society and environment. Her research has covered areas from housing affordability to modern slavery,

climate change to gender equity, and the impact of technologies on our economic structures. In 2020, Nicki was admitted as an expert faculty member (economics) to Singularity University. Nicki is a former Chair of the NSW Women in Economics Network, a current council member for the Economics Society of Australia (NSW) and the Australian Business Economists, and a Board member for One Million Women. Nicki is also a frequent commentator in the media and is a regular guest on both The Drum and The Project.

Robyn Jacobson, CTA is the Senior Advocate at The Tax Institute. She has nearly three decades in the profession, including a public practice background which preceded her various training roles over 23 years. Robyn continues to be a regular conference and webinar presenter, and is an avid advocate, social media commentator, columnist, blogger and podcaster. She is also regularly quoted in the media. Robyn is a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. She regularly consults with the Treasury, ATO and professional bodies on technical issues including as a member of the ATO's Tax Practitioner Stewardship Group. Robyn was recognised in the Women In Finance Awards 2019 as the Winner of Thought Leader of the Year and was named in the global Top 50 Women in Accounting 2019. She was recognised in the Australian Accounting Awards 2020 as the Winner of both Thought Leader of the Year and the Accountants Daily Excellence Award.

Dominic Moon, ATI, is a Principal Lawyer with a particular focus on providing practical solutions to contemporary taxation issues facing small to medium enterprises. His legal expertise traverses goods and services tax, income and capital gains tax, corporate tax including Division 7A, the consolidations regime, taxation of trusts and partnerships and state taxes and duties in all jurisdictions. With over 19 years of experience in legal practice, he also brings to his clients a broad experience in commercial transactions and contracts, estate and succession planning and business structuring and restructuring.

Presenter profiles continued

Catherine Parkinson is a Senior Manager in the EY Brisbane Tax Private Clients team. She has over 12 years' experience working with a range of clients from privately owned business to large multi-nationals and advising them on the Australian income tax implications arising from various transactions and inherent in their business structures. Catherine has focussed on the private business market in recent years and particularly enjoys helping clients to navigate the increasing complexities in the tax law.

Melinda Peters, CTA, is a specialist tax and duty lawyer, focusing on corporate and resources taxation at McCullough Robertson. Melinda currently acts for multinational corporations with Australian resource interests, a number of ASX-listed companies, widely held investment funds and a number of Australian start-ups. In addition to providing transaction structuring advice and tax opinions, Melinda advises on employee incentive arrangements for both listed and private groups. She also regularly acts for clients in taxation objections and disputes with the ATO.

Jacqui Reeves, CTA, is a Senior Manager at BusinessDEPOT, a 'one place for business' that provides an array of professional services to the SME market. With over 13 years' experience in Public Practice and 5 years working in the 'Big 4', Jacqui plays a key role as business and personal tax expert to many high net worth individuals and family owned businesses. Jacqui has a passion for finding solutions to complex tax issues and enjoys working with clients to navigate the best tax outcome for their personal situation

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.

Thomas Tulley, CTA, has over 25 years experience in advising small and large businesses and family groups, including opportunities and pitfalls of their structures and transactions. He is a partner in EY, leading the Brisbane Tax Private Clients team. He focuses on providing families and businesses with tax, accounting, asset and estate structuring and succession advice, particularly taxation of trusts, private companies and CGT.

Thomas Walrut, FTI, is a Senior Associate at Merthyr Law with over 10 year experience in providing tax advice to clients on both State and Federal tax issues. Tom primarily works with SME clients in a broad range of industries advising on tax planning, transactional matters, structuring and general commercial matters. He also regularly acts for clients in taxation objections and disputes with both State and Federal Revenue Authorities.

Mark West, CTA, is a principal and founder at West Garbutt. Qualified as a lawyer, chartered accountant and chartered tax adviser, Mark provides advice across the spectrum of taxes. He has experience in income tax, capital gains tax, goods and services tax, fringe benefits tax, payroll tax and land tax. Mark assists with all legal matters involving taxation law, including making applications for private, class or product rulings from the ATO. He assists with tax audits and with related settlement negotiations with the ATO and State revenue authorities. He also provides tax advice on restructures, mergers and acquisitions, and on debt and equity fundraisings. He has acted for clients in tax cases before the Administrative Appeals Tribunal and the Full Federal Court. Mark conducts tax due diligence reviews, prudential reviews (i.e. prior to ATO or State revenue authority audit) of taxation exposures and gives opinions on uncertain or 'reportable' tax positions. Mark acts for high wealth individuals, for private groups and for

listed company groups across sectors including engineering, investment funds, information technology and property. He has a number of clients in the retirement living field and is a recognised expert on taxation issues in that industry. He also advises on taxation matters for the non-profit sector, including private ancillary foundations. Mark regularly conducts training and presentations on taxation matters for accounting and legal firms as well as for professional and industry bodies. Marks expertise has been recognised by his peers for many years. In recent years Mark been listed as a leading tax lawyer in Queensland by Doyles Guide for 2017 and 2018. Mark has also been recognised by his peers for inclusion in the The Best Lawyers™ in Australia since 2013 for Tax Law, Retirement Villages and Senior Living Law.

“*This signature event is a must for any adviser in the private business space and provides access to expert speakers and the best and brightest ideas from fellow members.*”

Robyn Jacobson, CTA, The Tax Institute



Further information

Face to face registration inclusions

- Participation in the full technical program
- Electronic access to technical materials prior to the retreat and post-event recordings
- Lunch and refreshment breaks during the retreat on both Thursday and Friday

Please note: The registration fee does not include accommodation, hotel incidentals, transfers or the conference dinner.

Online registration inclusions

- Participation in the full technical program via live-stream or post event recordings
- Electronic access to technical materials prior to the retreat

Early bird registration

All registrations received and paid on or before Friday 22 January 2021 will be entitled to an early bird discount.

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 asked to download the app on their phone or tablet prior to the event. Materials will be made available for download approximately five days before the event. At this time, an email will be sent to delegates with access details.

Retreat dinner

The retreat dinner will be held on Thursday 25 February for onsite delegates. The cost of this dinner is not included in the registration fee and can be purchased for \$150. Additional tickets can also be purchased at the same cost. Please indicate on the registration form if you wish to attend the dinner and if you require additional tickets.

Venue

Palazzo Versace Gold Coast 94 Seaworld Drive, Main Beach QLD 4217

Palazzo Versace Gold Coast is located at Main Beach; a one hour drive south of Brisbane, or a 40-minute drive north of Gold Coast Airport. At the sophisticated end of the Gold Coast, Main Beach presents an opulent shopping centre, a fabulous marina and the aquatic theme park, Sea World, all on the footsteps of a white, sandy beach. Palazzo Versace Gold Coast provides a waterfront setting, spectacular architecture, extraordinary service and an ambience of pure glamour.

Getting there

Accommodation

Favourable room rates have been negotiated and secured at Palazzo Versace Gold Coast. Accommodation bookings can be made through our accommodation and travel provider, ConferenceNational by following the link on the event web page (taxinstitute.com.au/PBTR).

Please note that 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.

Dress code

Business casual attire is suitable for the daytime sessions and for the Thursday night dinner.

Delegate list

To assist with networking, a delegate list will be included electronically on the event app. Please contact the Queensland office if you do not want your name included on the list.

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 5 days before the event. Once these are available, an email will be sent to delegates with access details.

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.

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 please contact the Queensland office on:

Tel: 07 3225 5200

Email: qld@taxinstitute.com.au

For registration enquiries, please contact our customer admin team on: email: customeradmin@taxinstitute.com.au



THE TAX INSTITUTE

2021 Private Business Tax Retreat Registration form

41300/41315 | 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

Face to face – Full conference registration

	Member	Non-member
Early bird registration Received on or before 22 Jan 2021	<input type="checkbox"/> \$1,300	<input type="checkbox"/> \$1,600
Standard registration Received after 22 Jan 2021	<input type="checkbox"/> \$1,500	<input type="checkbox"/> \$1,800

Virtual – Full conference registration

	Member	Non-member
Early bird registration Received on or before 22 Jan 2021	<input type="checkbox"/> \$1,150	<input type="checkbox"/> \$1,450
Standard registration Received after 22 Jan 2021	<input type="checkbox"/> \$1,350	<input type="checkbox"/> \$1,650

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:

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 Conference dinner

The conference dinner is NOT INCLUDED in the registration fee for delegates.

Thursday 25 February at Vanitas Restaurant

Yes, I WILL be attending the conference dinner at a cost of \$150 OR

No, I WILL NOT be attending the conference dinner

Additional tickets*

Yes, I require additional tickets for the conference dinner at \$150 per person

No. x tickets at \$150 each: \$

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

4 Payment summary

Registration fee	\$	<input type="text"/>
Delegate tickets – Conference Dinner (\$150 each)	\$	<input type="text"/>
Additional guest tickets – Conference dinner (\$150 each)	\$	<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.

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: Cardholder's signature:

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

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TO REGISTER

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

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

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