



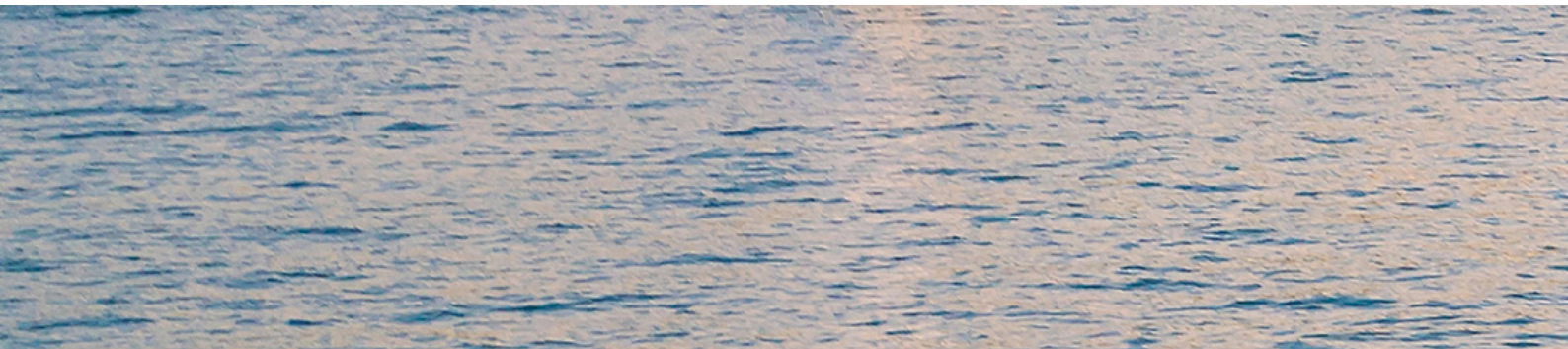
THE TAX INSTITUTE



2019 National Superannuation Conference

29–30 August 2019 | Four Seasons Hotel, Sydney

12 CPD hours



Welcome

It gives me great pleasure to invite you to attend our National Superannuation Conference to be held at the Four Seasons Hotel in Sydney on 29–30 August 2019.

Now in its seventh year, the conference has grown to be recognised as the premier event for tax specialists in the superannuation industry, uniquely dealing with the tax issues impacting both the large fund and self-managed superannuation fund sectors.

We find ourselves in an environment of greater scrutiny and demands from regulators, along with escalating complexity in investments and a rapidly changing global tax landscape. This carries significant implications for superannuation funds across the industry, their tax governance, and the demands on the tax professionals that advise them.

This program brings together regulators and leading practitioners from the legal, accounting, audit and financial advisory services fields of the superannuation industry for two full days to discuss tax and related challenges and the opportunities that these will bring. Speakers have been chosen because they are leading superannuation and tax experts with the essential blend of knowledge and experience in the practical application of the laws. A mixture of plenary sessions and two streams of breakout sessions are offered. Delegates can pick and choose breakout sessions from either stream.

In addition to the outstanding technical content, the program has been designed to also enable you to network and relax with colleagues and peers, and conference registration includes attendance at the networking function on Thursday 29 August at the Four Seasons Hotel.

I encourage you to register your attendance on or before Friday 19 July to receive the early bird discount and ensure your place.

Finally, I would like to take the opportunity to thank the organising committee and The Tax Institute staff for their work in putting this exceptional program together.

I look forward to seeing you there.



Allister Sime, CTA, PwC
Chair, Conference Organising Committee

Thank you

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

Allister Sime, CTA, PwC (Chair, Conference Organising Committee)

Phil Broderick, CTA, Sladen Legal (Co-Chair, Conference Organising Committee)

Nidal Danoun, CTA, Prosperity Financial Services Pty Ltd

Thalia Dardamanis, CTA, UniSuper

Karen Forster, CTA, REST Industry Super

Stephen Heath, CTA, Wallmans Lawyers

Brad Ivens, EY

Daryn Loo, Cbus

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Meghan Speers, Deloitte

Ross Stephens, CTA, KPMG

Proudly supported by:



Technical program

Day 1 – Thursday 29 August 2019

Time	Session	Presenter
8.30–9.30am	Registration	
	Welcome and Opening Address	Allister Sime, CTA PwC
9.30–9.45am	Senior Tax Policy Update	Stephanie Caredes, CTA The Tax Institute
9.45–10.45am	Session 1: Economic Outlook - Implications for the Superannuation Industry	Craig James CommSec
10.45–11.15am	Morning tea	
11.15am–12.15pm	Session 2A: ATO Presentation – Issues for Large Funds This session will focus on key current issues for large funds, drawn from our assurance work over the past 12 months including: <ul style="list-style-type: none"> — Priority income tax issues for review — Key observations in relation to governance — Future areas of focus for the ATO The session will also reflect on possible tax implications of remediation action taken following the Financial Services Royal Commission.	Hoa Wood Australian Taxation Office Robert Thomson Australian Taxation Office
OR	Session 2B: Contributions Since 1 July 2017, it has become even more difficult to build up superannuation benefits for retirement. There are many elements we have to now navigate to provide advice to our clients in this area. This session will identify the issues, strategies and opportunities to contribute to superannuation, as well as provide practical considerations for our clients, with the aim to optimise their overall benefits by retirement, including: <ul style="list-style-type: none"> — What's new – work test, extension of bring forward provisions to age 66, downsizer contributions — Total superannuation balance considerations — Dealing with the practicalities of an excess — Division 293 tax processes and procedures — Strategies and opportunities – spouse equalisation, contribution splitting, withdrawal and retribution strategies. 	Craig Day Colonial First State
12.15–1.15pm	Session 3A: Emerging Developments – Large Funds This session will discuss the latest issues impacting the large superannuation fund sector, including: <ul style="list-style-type: none"> — The recent federal election — Administration of TBC — Interplay of tax legislation — How do the Tax Act and ATO interact? — Hybrid mismatch/anti-hybrids — What are the provisions regarding excess TBC? — What are the obligations of large funds? — What happens when there are competing obligations? 	Neil Lamb KPMG Ross Stephens, CTA KPMG
OR	Session 3B: Pensions and ECPI From 1 July 2017, the exempt current pension income (ECPI) rules have become more complicated than ever. This session will examine some of those complexities, including: <ul style="list-style-type: none"> — Eligibility to claim ECPI — Deemed segregation — ECPI for SMSFs with disregarded small fund assets — ECPI strategies. 	Melanie Dunn Accurium

Technical program continued

Day 1 – Thursday 29 August 2019

Time	Session	Presenter
1.15 – 2.15pm	Lunch	
2.15 – 3.15pm	Session 4A: Specific Issues Around Foreign Investments The European Fund Industry has experienced year-on-year growth in net assets in the last decade and despite larger market uncertainties in the region during this period. This demand and growth reflects the appetite of worldwide investors for European assets including an increasing interest from Australian superannuation funds seeking to use the European jurisdiction as an investment platform to manage European Assets. With Luxembourg remaining the leading fund domicile in Europe this session will focus on: <ul style="list-style-type: none"> – Market trends (investment strategies, fund raising, investor and investment jurisdictions of choice); – How asset managers typically “link” a non-EU investment platform to an EU investment platform (case studies); – BEPS, BREXIT and the impact of the changing tax environment on the operating models of alternative investment fund managers; – The Luxembourg investment vehicles (from regulated to non-regulated vehicles) and an analysis of other comparable global vehicles; and – How to manage the tax risk and reputation of such investment platform(s) from an Australian perspective. 	Francisco Da Cunha Deloitte, Luxembourg Yves Knel Deloitte, Luxembourg
OR	Session 4B: ATO Update – SMSF Regulator Focus Areas This session will cover the ATO’s risk focus areas as regulator including: <ul style="list-style-type: none"> – The ATO compliance program – Baseline monitoring program – Current issues with TBAR 	Ben Murphy Australian Taxation Office
3.15 – 4.15pm	Session 5A: Domestic Investments This session will cover the developments affecting domestic investments for superannuation funds and consortia that superannuation funds may invest with. It will be predominantly concerned with underlying asset level considerations and how these may ultimately impact on valuations, bidding models and structures.	Sach Pelpola PwC Daryn Loo Cbus
OR	Session 5B: Superannuation Death Benefits – Recent Cases and Thinking Recent case law demonstrates the need to get this problematic area right; there is only one opportunity to achieve robust management of the conflicts and trustee decision-making processes. Certainly relevant to SMSFs, the session will also highlight how to defend or attack trustees and beneficiaries of APRA-regulated large funds.	Peter Bobbin, CTA Argyle Lawyers
4.15 – 4.30pm	Afternoon tea	
4.30 – 5.30pm	Session 6A: Update on Justified Trust for Super Funds This session will discuss: <ul style="list-style-type: none"> – An update on the ATO assurance activity/Top 1000 reviews and ‘findings to date’; – Tax Governance for Super Funds, specifically Current status/Future State, including Board expectations and expectations of Third Party providers; and – An update on Tax Transparency for Super Funds. 	Robert Thomson Australian Taxation Office Chris Vanderkley, CTA PwC
OR	Session 6B: Investments – What’s New? This session will provide an update on: <ul style="list-style-type: none"> – Non-arm’s length income (NALI) – Limited recourse borrowing arrangements (LRBAs) – In-house assets (IHA) – Sole purpose test – Areas of ATO focus – Property. 	Bryce Figot, CTA DBA Lawyers
5.30 – 7.00pm	Networking cocktail function, Four Seasons Hotel	

Day 2 – Friday 30 August 2019

Time	Session	Presenter
9.00–9.30am	Session 7: Keynote Address by Senator the Hon Jane Hume, Assistant Minister for Superannuation, Financial Services and Financial Technology	
9.30–10.30am	Session 8: Trends in Court Decisions Affecting Superannuation Funds There has been a significant increase in superannuation matters coming before Australian courts. This session will look at a number of recent cases that have been significant for the superannuation industry and will identify principles and likely consequences for the industry. It will also cover case law developments that practitioners need to be aware of.	Denis Barlin, CTA 13 Wentworth Selborne Chambers
10.30–11.00am	Morning tea	
11.00am–12.00pm	Session 9A: The Use of Equity Derivatives in Superannuation The use of equity derivatives in superannuation for hedging and risk management purposes continue to be the main areas of derivative usage for superannuation funds. However the taxation treatment of such arrangements is less clear, particularly the overlay of the capital gains tax code and access to franking credits. This session will focus on the following key areas: <ul style="list-style-type: none"> – The taxation treatment of the various different types of equity derivatives commonly used by superannuation funds – Consideration of public guidance issued by the ATO and potential anti-avoidance considerations; and – The session will also consider the impact of potential policy changes, on both member behaviour and the industry. 	Jessika Heynen, CTA First State Super Natalie Raju KPMG
OR	Session 9B: Resolving and Avoiding Internal Disputes in SMSFs Members and trustees of SMSFs will sometimes become estranged because of disputes involving their family or business relationships. These kinds of internal disputes will often mean that simple day-to-day functions for the SMSF cannot be completed, for example finalising accounts, disposing of investments and paying benefits. This session will consider various scenarios for how to avoid and resolve matters when these internal disputes occur.	Phil Broderick, CTA Sladen Legal

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- CPD event discounts
- Publications and tax product discounts
- Business Alliance Partner discounts.

Become a member

See registration form for details.

Technical program continued

Day 2 – Friday 30 August 2019

Time	Session	Presenter
12.00–1.00pm	Session 10A: Ways Superannuation Funds Can Operationalise the Tax Legislation Through the Use of Technology In this session, participants will learn how technology can assist funds. It will cover its role as part of the: <ul style="list-style-type: none">— investment process on a pre-trade basis, to lead to improved member/investor returns— reporting and compliance process, to not only ensure optimal tax outcomes after the event, but to streamline the flow of data and ensure the right data is being used for the right purpose and to also build rapport with regulators— product creation and implementation process, to enable investment tax data to feed through to member outcomes.	Elly Grace GBST
OR	Session 10B: Legislative and Reform Update – SMSFs This high energy, fast moving legislative update will provide an update on recent legislative changes and proposed changes impacting on the SMSF sector. This session will provide a detailed stocktake of reforms that survived the May Federal election and will preview the SMSF legislative agenda for the year ahead. The following technical topics will be covered: <ul style="list-style-type: none">— Work test and contribution bring-forward rules changes— Changes to ECPI and the new ‘choice of calculation method’ approach— LRBA and NALI integrity measures— TBAR reporting changes and associated pension and contribution cap strategies— Stocktake of future technical amendments to address legislative defects.	Peter Burgess SuperConcepts
1.00–2.00pm	Lunch	



Day 2 – Friday 30 August 2019

Time	Session	Presenter
2.00–3.00pm	Session 11A: GST Issues in the Superannuation Industry This session will discuss recent and topical GST technical issues for superannuation funds, including eligibility for RITCs, apportionment methodologies, GST issues post Royal Commission and other GST governance risk areas.	Ashley Dunstan, CTA Australian Taxation Office
OR	Session 11B: Tips, Traps and Strategies for Pension Commencement The transfer balance cap is now enshrined in our businesses and requires substantial consideration for our clients as part of their retirement planning, estate planning and meeting their living needs. Once a pension is commenced, it doesn't mean there are no further matters to resolve with respect to such a pension. This session will consider in detail the issues to review and strategies to consider to optimise pensions for our clients, while also factoring in the practicalities of it all. The session will focus on: <ul style="list-style-type: none">— Outlining the pros and cons of transition to retirement to advise your clients— Understanding the information and reporting required when a member in transition to retirement attains age 65— Considering whether your client's pensions should be reversionary— Considering the administrative requirements when a pension member passes away— Understanding the strategies for clients taking out more than their minimum pension.	Ben Nolan EY
3.00–3.30pm	Afternoon tea	
3.30–4.30pm	Session 12: Digital Disruption and the Superannuation Industry This session will explore issues on digital disruption and the superannuation industry and address questions such as: <ul style="list-style-type: none">— Tax changes lead to misunderstanding or lack of confidence by members – what can funds do to close this gap?— Engaging with millennials – better service, better information and investment purposes aligned – what are the connecting factors?— Where can robotic process automation (RPA) impact the industry for the better in the finance delivery?— Where can artificial intelligence (AI) have an impact?	Pete Williams
4.30–5.00pm	Closing drinks	

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Presenter profiles

Denis Barlin, CTA, is a Barrister at 13 Wentworth Selborne Chambers. He advises on taxes generally (both federal and state taxes), superannuation, equity and trusts, as well as asset protection. Denis also conducts disputes as an advocate in both state and federal tribunals and courts.

Peter Bobbin, CTA, of Argyle Lawyers, is in his 32nd year of superannuation, taxation and estate planning solutions. Many clients, large and small, have business and family wealth succession plans that are operating today, which were first developed 27 years ago under Peter's guidance. He is a former lecturer in the Masters of Taxation, Laws and Financial Planning degrees at the University of Western Sydney, and has presented to the ATO, ASIC and a variety of other acronym organisations. In 2015, Peter was awarded SME Tax Adviser of the Year by The Tax Institute.

Phil Broderick, CTA, is a principal of Sladen Legal and heads its superannuation team. He is member of a number of superannuation-related committees. This includes being the co-chair of The Tax Institute's Superannuation Committee and the chair of SISFA's Technical Committee. He is also a member of a number of the ATO's superannuation liaison groups including the Superannuation Industry Relationship Network (SIRN) and the Superannuation Industry Stewardship Group (SISG). Phil is also heavily involved in liaising with Treasury and the ATO in relation to the implementation of new superannuation laws and administrative practices. Phil's areas of practice include superannuation, estate planning and succession, duties and state taxes, trusts, federal tax and business structuring. He is regular author and presenter. His articles have featured in The Tax Institute's Taxation in Australia journal and CCH's Super News. He has presented at seminars and conferences conducted by The Tax Institute, the Television Education Network and various other accounting bodies.

Peter Burgess is General Manager, Technical Services and Education, at SuperConcepts. Peter is a member of SuperConcepts' Leadership Team and

is responsible for the delivery of adviser training courses and technical support services to SuperConcepts' clients. Peter has a strong reputation as an authority in SMSF technical matters and government policy design.

Stephanie Caredes, CTA, Tax Counsel, is responsible for The Tax Institute's policy and advocacy activities and regularly engages with all levels of government including Treasury and the ATO. Prior to joining The Tax Institute, Stephanie gained extensive experience in private practice advising on a wide range of federal and state taxation issues. Stephanie holds a masters-level degree in Law from the University of Sydney and is admitted as a Solicitor and Barrister in both the Supreme Court of New South Wales and High Court of Australia. She has also published a variety of articles and commentary in relation to taxation issues.

Franciso Da Cunha is a Partner in the Cross-Border M&A tax Department of Deloitte Luxembourg. He leads their Real Estate practice and assists a wide variety of clients in the Real Estate, Infrastructure and Private Equity industries. In addition to this Franciso provides European and international tax structuring advice and assists clients throughout all of the Alternative Asset management lifecycle, from fund structuring advice, MEP carry structure and general M&A tax advice. Francisco is a lawyer registered in the Portuguese Bar Association and is a frequent speaker at conferences and author of several articles related to International Tax, the latest being the IFA country report on BEPS for Luxembourg.

Craig Day is the Executive Manager of Colonial First State's technical services team, FirstTech, and has over 19 years experience in the financial services industry. In this role, Craig is responsible for providing specialist technical support to the Commonwealth Bank of Australia's investment, superannuation and advice businesses, and to act as a media spokesperson for Colonial First State on superannuation and retirement planning issues.

Melanie Dunn is a qualified actuary specialising in global retirement income systems. She heads up SMSF retirement specialist Accurium's Technical Services capabilities, making regular contributions to the Accurium Technical Hub and webinars. Melanie's passion for SMSFs and retirement has seen her develop into a thought leader and highly sought-after speaker with extensive knowledge of Australia's SMSF retirement system, best practices and legislation.

Ashley Dunstan, CTA, is a Technical Director at the Australian Taxation Office. Ashley has over 19 years experience in GST advisory. In Ashley's current role he provides guidance and advice on GST to the financial services industry. Prior to joining the ATO Ashley worked for a Big 4 accounting firm providing GST advice and practical assistance to clients, including providing technical and structuring advice on a range of GST issues, and assisting clients through ATO audits.

Bryce Figot, CTA, is a Director at leading SMSF law firm, DBA Lawyers. He practises predominantly in taxation and superannuation law, particularly the law of SMSFs. He is regularly quoted and published in the *Australian Financial Review*, the *Herald Sun*, CCH and LexisNexis publications, and elsewhere in the financial press. He presents extensively to accountants, financial planners and lawyers Australia-wide. Bryce has worked with DBA Lawyers since 2003. He holds both a bachelor degree and a masters degree in law and is an accredited Specialist SMSF Adviser.

Elly Grace has over 15 years of experience in tax and financial services, and is currently Client Relationship Manager and Tax SME for GBST, a global technology company that specialises in the development of market-leading software for the superannuation, asset management and broader financial services industry. Elly commenced her career with KPMG's Financial Services Tax group, and held finance roles at Computershare and with the Irish law firm, A&L Goodbody. She has spent the majority of her career at NAB, progressing through the

Asset Servicing business from Fund Accountant, to Head of Tax Policy and Associate Director of Product and Strategic Alliances, to a senior Client Relationship Manager. A member of the extended Asset Servicing Leadership team, Elly was responsible for embedding best-of-breed strategic alliances and driving product initiatives to benefit Asset Servicing clients. Prior to joining GBST, Elly worked for Northern Trust and AustralianSuper as a Senior Investment Tax Analyst.

Jessika Heynen, CTA, is a Senior Tax Analyst in the Investments Tax team at First State Super, providing tax advice on the fund's new and existing investments both domestic and offshore. Prior to joining First State Super, Jessika started her career at KPMG advising a wide range of clients in the financial services sector, focussing on superannuation funds and managed funds. Jessika also has in-house experience at Australian banks specialising in the tax aspects of asset management products.

Craig James has a knack for making economics user friendly. He's currently chief economist at CommSec, interpreting 'big picture' economic and financial trends for customers, clients and staff. CommSec is known for innovative, 'user friendly' reports including State of the States, the CommSec iPhone Index and CommSec Home Size report. As well as providing presentations to staff and clients and commentaries on financial and economic trends, Craig appears regularly in the electronic and print media. Craig currently does around two to three regular TV crosses a day, ad hoc radio and newspaper interviews. He was appointed Adjunct Professor at Perth's Curtin Business School in 2012.

Yves Knel is an International Tax Partner in Deloitte's Luxembourg office focusing on M&A as well as the firm's Asia Pacific client base. He has over 19 years of experience in international tax planning for multinational corporation, funds and asset managers in alternative investment strategies based in the US, Europe, and the Asia Pacific region. Yves also spent three

years of his career in Hong Kong and is a co-leader in Deloitte Luxembourg's Chinese Services Group. He is a frequent public speaker promoting the use of the Luxembourg platform in international tax planning and as a platform location.

Neil Lamb is a Tax Partner in KPMG's Asset and Wealth Management practice. Neil advises retail, corporate and industry superannuation funds on a range of issues including interaction with the ATO, product design and implementation, tax accruals in unit pricing and fund mergers. Neil also advises on a range of investment tax related issues in respect of property, infrastructure and private equity investments.

Daryn Loo is the Head of Investment Tax at Cbus, advising on the tax aspects of the fund's domestic and international investments. Prior to joining Cbus, Daryn spent over a decade in Big 4 accounting firms and the ATO specialising in financial services and M&A tax. During that time, Daryn advised a broad range of clients, including superannuation/pension funds, sovereign funds, managed funds, banks and custodians.

Ben Nolan is a Director in EY's Indirect Tax practice in Sydney. Ben specialises in providing GST advice and assistance to clients in the financial services sector, including asset management and superannuation. Ben has over 10 years experience in indirect taxes and has provided advice on all aspects of the GST law to multinational corporates and large Australian organisations. Ben has a keen interest in digital tax and the use of technology to improve management of GST risks.

Sach Pelpola is a Tax Partner at PwC with a focus on the financial services sector. Sach has extensive experience advising asset managers and superannuation funds on acquisitions, ongoing maintenance and considerations in respect of domestic and foreign investments. Sach was also previously seconded to the Department of Treasury, working on tax policy issues.

Natalie Raju is a Tax Partner with KPMG and has more than 15 years experience advising on taxation issues relevant to the funds management and the broader financial services industry. Natalie also has five years in-house experience with a fund manager, where she was a lead product originator and tax counsel.

Jemma Sanderson, CTA, is a Director at Cooper Partners Financial Services, heading up their SMSF specialist services. Jemma provides strategic advice on SMSFs, estate planning and wealth management to clients, as well as technical support to accounting, legal and financial planning groups. Jemma is a regular presenter on superannuation and SMSFs for The Tax Institute and other professional bodies across Australia. Jemma is the author of the popular *SMSF Guide* published by The Tax

“ I have been involved with The Tax Institute's national superannuation conference for a number of years including on the organising committee and as a speaker. In a crowded market, the national conference stands out as the pre-eminent conference for tax issues relating to superannuation funds.”

Phil Broderick, CTA, Sladen Legal

Presenter profiles continued

Institute, currently in its 9th edition, and is the author and convener of The Tax Institute's Graduate Diploma of Applied Tax Law "Advanced Superannuation" unit. Jemma was recently named as SMSF Adviser of the Year for the second year running at the 2018 National Women in Finance awards, and SMSF Adviser of the year at the 2018 WA SMSF and Accounting Awards. Jemma was the recipient of the Chairman's Award at the 2018 SMSF Association National Convention for her contribution to the industry, and in March 2019 was named as one of WA Business News' 40 under 40.

Allister Sime, CTA, is a Director at PwC and an adviser to large superannuation fund clients on Australian and international income tax matters. Allister has expertise across the many facets of a large fund's income tax experience, including domestic and international investment due diligence and structuring issues, member benefits, unit pricing, and income tax compliance matters.

Ross Stephens, CTA, of KPMG is one of the most recognised tax advisers to the superannuation industry in Australia, with key clientele including many of the largest industry, corporate, public sector and retail funds. He has assisted the Association of Superannuation Funds of Australia with many industry submissions to government, Treasury,

and the ATO, including treatment of super funds within international tax treaties and a range of issues relating to funds' foreign income tax offset entitlements.

Robert Thomson is an Assistant Commissioner in the Public Groups and International business line of the ATO. As part of his role, Robert has responsibility for the Investment Industry Strategy, which includes assuring that insurance companies and large APRA regulated superannuation funds are paying the right amount of income tax. Robert was previously held a number of roles in the ATO including as Minister-Counsellor of Taxation in the Delegation to the Organisation for Economic Cooperation and Development (OECD) at the Australian Embassy in Paris.

Chris Vanderkley, CTA, leads PwC's Transparency practice and co-leads their Tax Governance practice. He has assisted more than 70 of the firm's clients in implementing their tax governance framework and supported them with their ATO Top 1000 Streamlined Assurance Reviews. Chris has 35 years' experience as a tax professional. Chris was the former Director of Tax at GE and acted as public officer for all of GE's GE entities. Chris was also the country CFO at GE and chaired most of GE's Boards.

Pete Williams is a recognised thought leader and practitioner in innovation with a particular focus on digital innovation as well as how societal and technology changes will impact the future of industries. He has been the Chairman of Deloitte's Innovation Council since 2004 and has worked with boards and senior executives of many companies helping them understand and adapt to the rapidly changing digital environment as well as being a sought after speaker and media commentator both locally and internationally. Pete is Chief Edge Officer for Deloitte Centre for the Edge AU. The Centre focuses on major changes in the business environment driven by digital innovation and globalisation.

Hoa Wood is an Assistant Commissioner at the Australian Taxation Office. Hoa has over 20 years' experience in tax administration (both ATO and at the Treasury) and is currently a Deputy Chief Tax Counsel in the ATO's Tax Counsel Network. In Hoa's current role, she provides technical and strategic guidance on many of the ATO's highest profile and most complex technical issues, proposed legislative amendments and Federal and High Court litigation matters. Hoa works with her national teams in the Tax Counsel Network that have a focus on superannuation, indirect taxes and employer obligations.





Event information

Registration options and inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Conference lunches	Conference welcome reception and networking*	How to register
Full conference 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 Networking function can be purchased on the registration form.



Register online at taxinstitute.com.au/sup19

Early bird registration

All registrations received and paid for on or prior to Friday 19 July 2019 will be entitled to an early bird discount.

Group discount

Purchase four full registrations and receive the fifth one free. All attendees must be from the same firm and all registration forms must be submitted together.

National Superannuation Conference app

The National Superannuation Conference app will be available for download approximately one week prior to the event. The app will contain session and speaker information, the delegate list and available technical materials. You will receive instructions via email detailing how to download the app.

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.

Special dietary requirements

Please indicate any special dietary requirements on the registration form.

Confirmation of registration

Please note you will receive two separate emails in the form of a confirmation email and tax invoice.

CPD accreditation

Attendance at the conference counts for 12 hours Continuing Professional Development accreditation with The Tax Institute.

This event is also accredited with the SMSF Association and Financial Planners Association. For more information, please contact The Tax Institute's National Events Team.





Venue and accommodation

Four Seasons Hotel

The National Superannuation Conference will be hosted at the stunning Four Seasons Hotel in Sydney.

Accommodation

To book accommodation at Four Seasons Hotel, contact the hotel directly at fourseasons.com/sydney.

Favourable room rates have been negotiated and secured at several hotels within close proximity to the conference. All accommodation bookings can be made through our accommodation and travel provider, ConferenceNational, for the 2019 National Superannuation Conference or by following the link on our website: taxinstitute.com.au/sup19.

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.

Networking function

A networking function will be held directly following the last session on Thursday from 5.30pm at the Four Seasons Hotel. The networking function is included in the conference registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$50. Please indicate your requirements, including dietary requirements, on the registration form.

Dress code

Smart casual attire is suitable for the duration of the conference program, including the networking function.

Getting there

The Four Seasons Hotel, Sydney is located at 199 George Street, Sydney and is the best located 5-star hotel in Sydney.

The Sydney Kingsford Smith Airport is a 45-minute drive from the hotel and serves all major airlines.

Circular Quay station is the closest railway station to the Four Seasons Hotel, which is approximately a two-minute walk from the station.

Local climate

During the month of August, Sydney experiences temperatures between 9°C and 18°C. There is a 32% chance of rain at this time of year.

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 to the delegate by The Tax Institute. 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 2019 National Superannuation Conference. 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.

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

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





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2019 National Superannuation Conference

Registration form

2019 National Superannuation Conference

40118 | 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 11 for registration inclusions.

	Early bird registration Register on or before 19 July 2019	Standard registration Register after 19 July 2019
Member	<input type="checkbox"/> \$1,595	<input type="checkbox"/> \$1,745
New member*	<input type="checkbox"/> \$1,935	<input type="checkbox"/> \$2,085
Non-member	<input type="checkbox"/> \$1,895	<input type="checkbox"/> \$2,045

☐ I understand that the registration fees do not include printed materials. Access to materials will be electronic.

Dietary requirements:

Promotional code:

*SPECIAL NEW MEMBER OFFER

The new member registration fee includes fees for Affiliate-level membership of The Tax Institute so that you can take advantage of the many benefits membership affords. Membership is extended until 30 June 2020. Please read and sign below to take up membership.

I hereby apply for membership of The Tax Institute. I declare I am a person of good fame, integrity and character and agree to be bound by the Constitution of The Tax Institute. For more information on membership, visit taxinstitute.com.au

Signature:

Date of signature:

2 Delegate contact details

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

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ 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 Networking function

The networking function is INCLUDED in the registration fee for delegates attending the full conference.

Thursday 29 August at the Four Seasons Hotel, Sydney

☐ Yes, I WILL be attending the networking function OR

☐ No, I WILL NOT be attending the networking function

Additional tickets^

☐ Yes, I require additional tickets for the networking function at \$50 per person

No. tickets at \$50 each: \$

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

Breakout session selection

Please tick the breakout sessions you would like to attend during the conference:

Thursday 29 August

11.15am–12.15pm

- ☐ Session 2A: ATO Presentation – Issues for Large Funds
☐ Session 2B: Contributions

12.15pm–1.15pm

- ☐ Session 3A: Emerging Developments – Large Funds
☐ Session 3B: Pensions and ECPI

2.15pm–3.15pm

- ☐ Session 4A: Specific Issues Around Foreign Investments
☐ Session 4B: ATO update - SMSF Regulator focus areas

3.15pm–4.15pm

- ☐ Session 5A: Domestic Investments
☐ Session 5B: Superannuation Death Benefits – Recent Cases and Thinking

4.30pm–5.30pm

- ☐ Session 6A: Update on Justified Trust for Super Funds
☐ Session 6B: Investments – What's New?

Friday 30 August

11.00am–12.00pm

- ☐ Session 9A: The Use of Equity Derivatives in Superannuation
☐ Session 9B: Resolving and Avoiding Internal Disputes in SMSFs

12.00pm–1.00pm

- ☐ Session 10A: Ways Superannuation Funds Can Operationalise the Tax Legislation Through the Use of Technology
☐ Session 10B: Legislative and Reform Update – SMSFs

2.00pm–3.00pm

- ☐ Session 11A: Indirect Taxes and Stamp Duties
☐ Session 11B: Tips, Traps and Strategies for Pension Commencement

Payment summary

Registration fee

\$

Additional conference networking function tickets (\$50 each)

\$

Total payable

\$

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

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.

Membership and education program promotion

- ☐ I am interested in becoming a member of The Tax Institute.
Please send me further details.
☐ I am interested in learning more about The Tax Institute's education program.
Please contact me.

Marketing and business alliance partner exclusions

- ☐ I no longer wish to provide my contact details to The Tax Institute's contracted business partners.
☐ I no longer wish to receive marketing correspondence from The Tax Institute.

We take your privacy seriously, and our policy can be viewed at taxinstitute.com.au/go/footer/privacy.

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TO REGISTER

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