



THE TAX INSTITUTE



# 2021 National Superannuation Conference

7–8 October | Online AEDT

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12 CPD hours

# Welcome

It gives me great pleasure to invite you to attend our National Superannuation Conference to be held virtually on 7–8 October 2021.

We're looking forward to experiencing the same great levels of engagement and interaction from our attendees this year, as we did with the 2020 online conference. Although we can't get together in person, we are still supporting one another as a community.

Now in its ninth 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.

The global pandemic has thrown out many challenges both here and overseas. However, Australia and the superannuation system has got through it all in relatively good shape (touch wood again!). But even during a pandemic, the superannuation system changes don't stop. In the past year we've seen the "Your Future, Your Super" legislation, 2021 budget measures and various interpretative views from the regulators. On top of that, and the business as usual activities, many practitioners and advisors have had to deal with the unique challenges that have been thrown at us in the last 18 months.

Which brings us back to the conference. 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, to tailor a conference experience directly fitting their areas of interest.

I encourage you to register your attendance on or before Friday, 3 September 2021 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.



**Phil Broderick, CTA**  
Sladen Legal  
Chair, Conference Organising Committee

## Thank you

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

**Nidal Danoun, CTA**, Prosperity Financial Services

**Thalia Dardamanis, CTA**, UniSuper

**Karen Forster, CTA**, REST Industry Super

**Stephen Heath, CTA**, Wallmans Lawyers

**Brad Ivens, ATI**, EY

**Daryn Loo**, Cbus

**Suzanne MacKenzie, CTA**, Bar Chambers

**Nick Panos, CTA**, N Panos & Associates Solicitors

**Jemma Sanderson, CTA**, Cooper Partners Financial Services

**Allister Sime, CTA**, PwC

**Meghan Speers**, Deloitte

**Ross Stephens, CTA**, KPMG

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## *Early bird offer*

*Register on or before Friday, 3 September 2021 to save!*

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# Technical program

*Day 1 – Thursday, 7 October 2021*

Time	Session	Presenter
8:30–9:15am	Registration	
9:15–9:30am	Welcome and opening address	<b>Phil Broderick, CTA</b> Sladen Legal Chair, Conference Organising Committee
9:30–10:30am	<b>Session 1: Economic update</b> We've experienced a tremendous level of economic disruption and transformation over the past 12 months. The economy fell into recession for the first time in three decades, but the recovery is now well under way.  This session, will reflect on the year that was, make observations on the outlook for the Australian and global economies post COVID-19; and finally, consider what's to come as we embrace a new normal.	<b>Craig James</b> CommSec
10:30–11:00am	Morning tea	
11:00am–12:00pm	<b>Session 2A: Emerging developments for Large Funds</b> This session will provide an analysis of the latest emerging issues facing the large fund sector.	<b>Marco Feltrin</b> PwC
OR	<b>Session 2B: Snapshot of changes affecting the SMSF industry</b> This update session will provide a rundown on all the legislative and regulatory changes impacting the SMSF sector over the last 12 months as well as recent ATO updates and guidance.  Highlighting the important changes and what they might mean for your clients, the session will also discuss other industry developments that will have an impact on trustees and their advisers.	<b>Liz Westover, FTI</b> Deloitte



# Technical program continued

## Day 1 – Thursday, 7 October 2021 continued

Time	Session	Presenter
12:00–1:00pm	<b>Session 3A: ATO presentation – issues for Large Funds</b> An update from the ATO on industry's progression in the Justified Trust program and the ATO's perspectives around fund tax governance, including updates on: <ul style="list-style-type: none"> <li>— Third party data Governance consultation</li> <li>— MIT Streamlined assurance program</li> <li>— Public Advice and Guidance</li> <li>— Next Actions Program – Scope / Issues / Outcomes</li> <li>— Top 1000 program – What's next</li> <li>— Industry Consolidation – Our observations</li> </ul>	<b>Nadia Alfonsi</b> Australian Taxation Office  <b>Andrew Grace</b> Australian Taxation Office  <b>Blake Sly</b> Australian Taxation Office
OR	<b>Session 3B: SMSFs – focusing on tax</b> Whilst SMSF compliance generally focuses on the SIS Act and Regulations, the Income Tax Act and Regulations are similarly important. This session will discuss tax issues in SMSFs including: <ul style="list-style-type: none"> <li>— ECPI</li> <li>— Deductions when claiming ECPI</li> <li>— Calculating capital losses/gains</li> <li>— CGT relief</li> <li>— Foreign tax credits and foreign exchange gains</li> <li>— Case studies will be used to illustrate the tax issues in each area, as well as identifying common errors in tax calculations.</li> </ul>	<b>Julie Dolan</b> KPMG
1:00–2:00pm	Lunch	
2:00–3:00pm	<b>Session 4A: Tax governance – consultation and third party data</b> Following the request by the ATO to contribute comments on the appropriate tax risk management and governance framework controls to effectively manage and mitigate the risk of inaccuracies in third party data, we saw the manner in which the investment management sector is reliant on each other to meet these expectations.  For this session, a panel of industry leaders will discuss the ATO's guidance on these important framework controls, as well as explore whether there is 'best practice' for our sector in relation to meeting superannuation funds tax and reporting obligations.	<b>Panel:</b> <b>Duncan Lyon, CTA</b> JP Morgan  <b>Abbey Pearce</b> Cbus  <b>Kara Singleton, ATI</b> Deloitte  <b>Facilitator:</b> <b>Damian Ryan, CTA</b> KPMG
OR	<b>Session 4B: Contributions – new caps, tips and traps</b> Keeping up with the superannuation contribution rules is a full time job with changes occurring every year since super reform took hold at 1 July 2017. 1 July 2021 is no different with this years biggest ticket item being the increase in the contribution caps and the general transfer balance cap. With an increase comes opportunity but there are plenty of traps to be mindful of. In this session we will review some of the key contribution issues including what the change to the caps means, with a specific focus on: <ul style="list-style-type: none"> <li>— Non-concessional contributions</li> <li>— The Bring-forward rules</li> <li>— The Carry-forward rules</li> <li>— Using contribution reserves</li> <li>— Contributions and the work test</li> <li>— How all this may be impacted come 1 July 2022</li> </ul>	<b>Tim Miller</b> SuperGuardian
3:00–3:30pm	Afternoon tea	

# Technical program continued

## Day 1 – Thursday, 7 October 2021 continued

Time	Session	Presenter
3:30 – 4:30pm	<b>Session 5A: Mergers – managing the tax complexities</b> Whilst superannuation merger relief is now a permanent feature of the income tax law, there remains numerous tax technical and practical challenges in undertaking a Successor Fund Transfer (SFT).  These go well beyond tax loss transfers and capital gains tax roll-over covered by Division 310, and include various income tax, indirect tax and other tax issues arising at the fund level, along with member taxation considerations and tax impacts for related entities.  With industry consolidation continuing at pace, this session will provide insights into managing the tax complexities.	<b>Megan McBain</b> Aware Super  <b>Brad Miller, CTA</b> EY
OR	<b>Session 5B: SMSF trust deeds – trips and traps</b> The trust deed of an SMSF is the fundamental building block for the governing of an SMSF. This session will examine SMSF trust deeds and what practitioners should look out for when reviewing or updating trust deeds.  The session will include: <ul style="list-style-type: none"><li>— What provisions should, and should not, be included in a trust deed?</li><li>— Death benefit provisions in trust deeds – problems we've seen from cases and potential solutions</li><li>— When should a trust deed be updated?</li><li>— The importance of ensuring past trust deed variations were effective</li><li>— Lost deeds – what can be done?</li></ul>	<b>Peter Bobbin, CTA</b> Coleman Greig Lawyers
4:30 – 5:30pm	<b>Session 6: Considering the impacts of NALI and NALE for large and small funds</b> Non-arm's length income (NALI) has been a particularly topical and challenging issue in recent years. This is particularly so with the introduction of the controversial non-arm's length expenditure (NALE) rules and the ATO's interpretation of them in LCR 2019/D3. This is an issue that affects both large APRA-regulated funds and SMSFs.  This plenary session will be led by an expert panel of practitioners including an update from the ATO on the latest thinking of, and issues of particular concern to, the Commissioner.	<b>Panel:</b> <b>Alex Affleck</b> Australian Taxation Office  <b>Dan Butler, CTA</b> DBA Lawyers  <b>More panellists to be announced!</b>  <b>Facilitator:</b> <b>Tony Negline</b> Chartered Accountants Australia and New Zealand

## Join the conversation



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# Technical program continued

## Day 2 – Friday, 8 October 2021

Time	Session	Presenter
8:30–9:00am	Tax Policy & Advocacy update	The Tax Institute
9:00–9:30am	Session 7: VIP Keynote address	<b>Senator the Hon. Jane Hume</b> Minister for Superannuation, Financial Services and the Digital Economy
9:30–10:30am	<b>Session 8: Trends in court decisions affecting the Superannuation industry</b> This session aims to examine recent cases likely to have an impact for practitioners in the superannuation industry who are providing advice for either Large Funds or SMSFs.  It will provide you with a shortcut to the recent case law you know you should have read and broaden your overall legal knowledge to improve your skills and practice. Finding out what went wrong for others, landing them in court, is often a good way to learn what not to do or offers a warning of what might be around the corner.	<b>Suzanne Mackenzie, CTA</b> Bar Chambers
10:30–11:00am	Morning tea	
11:00am–12:00pm	<b>Session 9A: Foreign issues in emerging markets</b> This session will provide an update on a range of current issues affecting large Australian superannuation funds in emerging markets.	<b>Puneet Arora</b> PwC
OR	<b>Session 9B: Key focus areas on the ATO's SMSF regulatory agenda</b> This session will cover how the ATO plans to address key risk focus areas for the 2022 financial year and will touch on some of the key policy changes impacting the SMSF sector.	<b>Kellie Grant</b> Australian Taxation Office
12:00–1:00pm	<b>Session 10A: Domestic investments</b> This session will focus on Australia's venture capital industry, and particularly early stage venture capital, as an asset class for large Australian superannuation funds, the typical structures used, and the specific tax provisions dealing with both investments into these structures and distributions received.	<b>Vimal Vincent</b> KPMG
OR	<b>Session 10B: Super Guarantee – no longer the toothless tiger</b> While the super guarantee regime has always granted the ATO with enforcement powers, recent changes to regime have increased the penalty regime significantly. On top of that, post the super guarantee amnesty, the ATO's enforcement of the regime and issue of penalties has gone into overdrive.  In this session, we will examine the super guarantee system and its penalty regime, including: <ul style="list-style-type: none"> <li>— An overview of the super guarantee system</li> <li>— Applying super guarantee to contractors – including the Moffet decision</li> <li>— What to do if you will be, or have been, late with super contributions?</li> <li>— SGC penalties and remissions in the post amnesty era</li> <li>— The application of the director penalty regime to super guarantee</li> </ul>	<b>Phil Broderick, CTA</b> Sladen Legal
1:00–2:00pm	Lunch	

# Technical program continued

## Day 2 – Friday, 8 October 2021 continued

Time	Session	Presenter
2:00–3:00pm	<b>Session 11A: Your Future, Your Super and other reforms</b> This session will provide an outline of current regulatory developments affecting the superannuation system, with a particular focus on the Your Future, Your Super package of reforms. The purpose, design and operational aspects of these measures will be explored, and potential tax impacts from them highlighted.	<b>Luke Barrett</b> UniSuper <b>Scott Glover</b> EY
OR	<b>Session 11B: Hidden death taxes – Superannuation death planning</b> Although Australia doesn't have death or inheritance taxes unlike other countries, when a member dies within a superannuation fund there are a number of taxing points with respect to benefits that need to be considered. In this session, Jemma will outline some of these hidden taxes and how to factor them into death planning, as well as when death benefits may be paid out, including: <ul style="list-style-type: none"> <li>— CGT on assets transferred out;</li> <li>— Lump-sum death benefits tax;</li> <li>— Transfer Balance Cap and death, including consideration of the impact of the indexation of the thresholds and exempt current pension income; and</li> <li>— Legacy pensions, reserve accounts and death – what does the Budget announcement mean, are these resolvable?</li> </ul>	<b>Jemma Sanderson, CTA</b> Cooper Partners Financial Services
3:00–3:30pm	<b>Afternoon tea</b>	
3:30–4:30pm	<b>Session 12: Are superannuation taxes and Age Pension benefits sustainable?</b> While we have had regular tweaking of the superannuation system annually for several decades, changes are still being made at every Budget.  Last year, the Retirement Income Review looked at the main sources of income for pensioners being the means-tested Age Pension and superannuation – and the dormant one of using equity in the family home to supplement retirement incomes.  The Report concluded that a 9.5% SG contribution rate was sufficient and that pensioners are not efficient in utilising the sources of income. If this is correct, what changes should be made to improve the overall efficiency of the retirement system?	<b>Michael Rice, AO</b>
4:30–5:00pm	<b>Close</b>	





# Presenter profiles

## *Led by tax experts for tax professionals*

**Nadia Alfonsi** is an Acting Assistant Commissioner in the Public Groups and International (PG&I) business line of the ATO. As part of her role, Nadia 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. Nadia is also responsible for PG&I Engagement and Assurance teams in Parramatta and Newcastle managing a range of taxpayer engagement activities including tax assurance reviews of Top 100 and Top 1000 taxpayers. Nadia has previously held a number of roles across the ATO including Superannuation & Employer Obligations, Tax Counsel Network and the Treasury.

**Luke Barrett** is General Counsel for UniSuper, and has over 20 years experience in financial services, advising fund managers and superannuation funds across all aspects of their businesses and investments. He leads UniSuper's Legal & Governance function and is responsible for the Fund's legal position across its superannuation, funds management, financial advice and administration businesses. Luke is the former Chair of the Law Council of Australia's Superannuation Committee and continues to serve on that committee, now for over 10 years. Luke also has non-executive director experience from serving as an independent trustee director on the board of Diversa Trustees Limited, which is the trustee of various superannuation funds. His prior experience includes senior legal positions with leading law firm Allens and with Vanguard Investments. Barrett regularly speaks at industry conferences.

**Peter Bobbin, CTA**, is a superannuation, taxation and estate planning solutions specialist. Many clients, large and small, have business and family wealth succession plans that are operating today, which were first developed 33 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 a 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 and policy 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 ATO in relation to the implementation of new super laws and administrative practices. Phil's areas of practice include superannuation, duties and state taxes, estate planning and succession, trusts, federal tax and business structuring. Phil was listed in the 2020 and 2021 Best Lawyers Australia for superannuation law and was the winner of the SMSF Association's SMSF Specialist Advisor (SSA) Top Achiever Award in 2019. 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 SMSF Association, the Television Education Network, Legalwise and various accounting bodies.

**Daniel Butler, CTA**, is one of Australia's leading SMSF lawyers and has worked predominantly in the SMSF, tax and related fields for over 30 years. He is a regular presenter on SMSF topics and has published extensively in professional journals including contributing a monthly article on SMSFs to the Taxation in Australia and other media. Dan is a member of the Tax Institute's National Superannuation Committee and is involved with a number of other tax and SMSF committees and discussion groups. Dan also presents on the subject Taxation of Superannuation at the University of Melbourne's Master of Laws/Tax program. Dan is also a Specialist SMSF Advisor.

**Julie Dolan** is the National Head of Superannuation and Estate Planning as well as the Sector Lead 'Asset & Wealth Management – Financial Services' for KPMG Enterprise. She is well recognised in the industry as a regular author & presenter as well as being involved in a number of technical committees. Julie has decades of experience in advising clients and industry in the areas of superannuation structuring and advice, taxation, succession and estate planning. When it comes to superannuation, her clients range from large APRA funds right through to SMSFs.



## Presenter profiles continued

**Marco Feltrin** is a Partner and leads the national superannuation tax practice for PwC. He has over 20 years experience and specialises in providing tax services to large superannuation funds and the funds management industry. Marco has advised many clients on numerous tax matters including domestic and cross boarder investments, tax authority reviews and disputes, and tax governance matters. Marco frequently presents to Boards and Audit Committees of large superannuation funds and is heavily involved with government in relation to tax reforms impacting the industry.

**Scott Glover** is a Partner with EY-Parthenon. He has 17 years management consulting experience and prior to consulting worked with a leading Australian fund manager and the financial services regulator. Scott's focus is strategy development and execution for clients predominantly in service related industries, with a sector focus on financial services (wealth, banking and insurance) and utilities. Scott also brings a compliance skill set having experience with the regulator and corporate risk teams prior to consulting, and on occasion has been seconded into senior client roles to oversee delivery of strategic programs.

**Kellie Grant** is Director of the Self-managed Super Funds at the Australian Taxation Office. With over 24 years of experience at the ATO, including the past 13 years in the superannuation space, Kellie has spent several years in the ATO Superannuation Complex Technical Unit, providing specialist advice on a range of technical issues, including those impacting self-managed super funds. Currently Kellie leads the SMSF Approved Auditors portfolio and has been a driving force in ensuring that auditors are able to meet their regulatory obligations in an ever-changing environment. She has a strong industry presence having presented key SMSF Regulator messages at industry events and her enthusiasm for embracing constructive engagement has seen her develop positive stakeholder relationships.

**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. 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 has worked in banking, finance and journalism for around 38 years and holds both Bachelor and Master in Commerce (Economics). He was appointed Adjunct Professor at Perth's Curtin Business School in 2012.

**Suzanne Mackenzie, CTA TEP**, is a Barrister specialising in financial services, superannuation, trusts and equity, taxation and general corporate and commercial matters work. Suzanne has a great depth of knowledge and experience in superannuation law and takes a keen interest in the latest changes and trends affecting the industry – having done so for more than 30 years. She acts for trustees of large industry and retail funds as well as public sector funds and also regularly acts in relation to smaller individual claims and matters affecting SMSFs.

**Megan McBain** joined Aware Super in 2015 and is the Head of Tax, leading both the Investment Tax and Group Tax activities of the Fund. Aware Super is one of Australia's largest superannuation funds and is committed to earning strong long-term returns and being a force for good for its members. Aware Super invests across a range of asset classes, including infrastructure, property, credit and private equity. Prior to joining Aware Super, Megan was at KPMG for over 13 years advising a wide range of clients within the financial services sectors, including superannuation funds, managed funds and custodians.

**Brad Miller, CTA**, is a Partner in EY'S Indirect Tax team in Melbourne, advising on a range of indirect taxes including GST. While Brad assists clients in different industries, he focuses on clients in the financial services sector (including superannuation) by providing clear and concise value propositions to clients on very technical aspects of the GST legislation. Brad also assists clients from an indirect tax perspective on due diligence; structuring for acquisitions; divestment, developing and documenting GST apportionment methodologies; and managing ATO audits and disputes. Brad is an active member of a number of indirect tax committees for different industry associations, regularly advocating on behalf of those associations before both the ATO and Treasury.

**Tim Miller** is the Education Manager at SuperGuardian and is one of Australia's leading SMSF educators and presenters with over 23 years' experience in the Superannuation industry. His experience has been gained through providing legislative and compliance support to thousands of Trustees, Accountants and Financial Planners since joining the SMSF sector in 1999. In addition to servicing the needs of SMSF clients, his practical and personable approach to compliance has made him a regular presenter on the SMSF circuit. Tim regularly presents at the major SMSF conferences and events, contributes to various trade and general publications and authored one of the original subjects of the SMSF Association Graduate Certificate delivered through the University of Adelaide and Kaplan, this was also adopted as part of the Chartered Accountants Australia and New Zealand ANZ SMSF specialist program. Tim's work in the professional development space has resulted in SuperGuardian being recognised as an SMSF Association Accredited Educator.

**Tony Negline** is Superannuation Leader at Chartered Accountants Australia and New Zealand, a position he has held since November 2015. Tony has 30 years' experience in the financial services industry in which he has previously held a number of senior positions. Tony is the author of The Essential SMSF Guide 2018/19, now in its 8th edition. Tony is a Chartered Accountant and CA SMSF Specialist. He holds a Bachelor of Arts and Graduate Diploma in Business Systems from Monash University. He also has a Diploma in Journalism and an Advanced Diploma of Financial Services (Superannuation). He is a Fellow of the Financial Services Institute of Australasia (Finsia) and a specialist member of the SMSF Association.

**Abbey Pearce** is the Head of Group Tax at Cbus. Prior to joining Cbus, Abbey spent more than 15 years in professional services, specialising in the taxation of APRA regulated superannuation funds and broader financial services participants, including sovereign wealth funds, managed funds and domestic and offshore fund managers. Abbey is also a member of the ASFA Tax Specialist Advisory Committee which is contributing to discussions with the ATO on tax governance and third party data.

## Presenter profiles continued

**Michael Rice** AO, Actuary, founded Rice Warner in 1987 and its business was recently sold to Deloitte. During his career, he specialised in providing strategic advice to all types of entities within the superannuation industry. He has a keen interest in public policy work and headed the team which undertook Rice Warner's detailed modelling and submissions to major government inquiries. He has undertaken considerable work in the integration of social security and superannuation as well as measuring the adequacy of retirement incomes overall and specifically for females. He was the inaugural Chairman of QSuper's Investment Committee from January 2009 to June 2013 and remained an independent investment expert on the committee until March 2016. He is a former Councillor of the Actuaries Institute and has participated in its public policy work for 30 years. Michael is also a member of the Advisory Board of the ANU College of Business and Economics. Michael was named Actuary of the Year in 2017 and was made an Officer of the Order of Australia in 2020 for his "distinguished service to business and economics, particularly to the actuarial profession, and through advisory roles."

**Jemma Sanderson, CTA**, is a Director of 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 and consultancy to accounting, legal and financial planning groups. Jemma has over

19 years experience in developing complex strategies for high net worth clients. Jemma has a Bachelor of Commerce from UWA and is a Certified Financial Planner, a Specialist Member of the SMSF Association (SMSFA), Chartered Tax Adviser (CTA) and Trusts and Estate Practitioner (TEP). Jemma is a regular presenter on superannuation and SMSFs for the Taxation Institute, Institute of Chartered Accountants, CPA and SMSFA across Australia. Jemma is the author of the Taxation Institute's popular publication for SMSF Advisers, the SMSF Guide, now in its ninth edition, and the author and convener of the Taxation Institute's Graduate Diploma of Applied Tax Law Advanced Superannuation Unit. Jemma was named the SMSF Adviser of the Year at the 2019 National Women in Finance awards for the third year in a row, and received the SMSF Association Chairman's Award in February 2018 for her contribution to the industry.

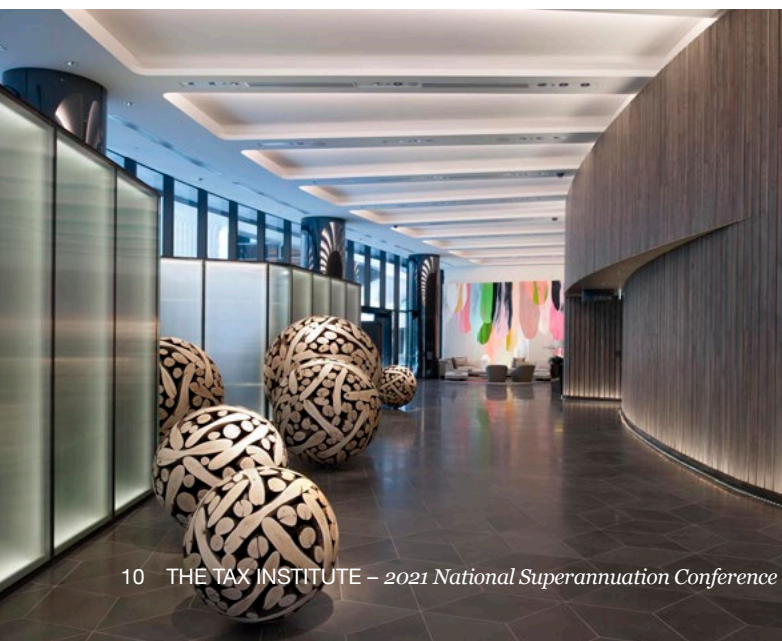
**Kara Singleton** is a Principal in Deloitte's FSI Tax Team with over 20 years experience advising the wealth management industry on tax risk management, investments, and all aspects of compliance. Kara has a particular interest in tax governance and working with clients to ensure appropriate and robust processes are in place to manage their key tax risks – including their reliance on third-party tax data.

**Blake Sly** is a director and strategy lead in the Public Groups and International (PG&I) business line of the ATO. As part of his role, Blake leads the PG&I

Investment Industry Strategy team, which includes assuring that insurance companies, managed funds and large APRA regulated superannuation funds are paying the right amount of income tax. Blake has previously held a number of roles across the ATO including Director roles in PG&I Infrastructure and Business Fragmentation Strategy and PGI Assurance and Engagement Newcastle and Paramatta.

**Vimal Vincent** is a Manager in KPMG Melbourne's Corporate Tax Division, specialising in corporate tax matters for financial services organisations.

**Liz Westover, FTI**, is a Partner and the National SMSF Leader at Deloitte. She is responsible for the firm's SMSF service offering providing compliance and advisory services to the firm's clients. Liz has extensive experience in superannuation and has strong capabilities on the technical application of superannuation and associated tax laws. She is a regular commentator on superannuation issues with mainstream and social media and has authored blogs and articles on superannuation and related issues for many years. Liz has been heavily involved in superannuation policy development and advocacy, regularly liaising and consulting with Government, regulators and stakeholders on technical, legislative and policy matters. She is a Fellow of The Tax Institute, Fellow Chartered Accountant, CA SMSF specialist and holds a Master of Legal Studies from the University of New South Wales and a Bachelor of Business from the University of South Australia.





# Event information

 **Register online at** [taxinstitute.com.au/2021NatSuper](https://taxinstitute.com.au/2021NatSuper)

## Early bird registration

All registrations received and paid for on or prior to Friday, 3 September 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.

This offer cannot be redeemed in conjunction with any other promotional offer or code.

All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 02 8223 0040 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

## Hybrid event

As a hybrid face-to-face and online event, this event will be accessible to all delegates via our dedicated Delegate Portal.

## Paperless materials

The Tax Institute understands the impact that an event of this nature has on the environment, especially when printing delegate materials. Technical papers and PowerPoint presentations will be available on the Delegate Portal to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the portal by email.

## Session recordings

As a hybrid event, delegates will have access to all session recordings\* (\*subject to terms) for the full conference, post-event.

## 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.

## Delegate list

To assist with networking, a delegate list will be included electronically on the Delegate Portal. Please contact The Tax Institute or indicate on your registration form if you do not want your name included on the list.

## COVID-19 Event Guidelines

At The Tax Institute, the health and wellbeing of our members, delegates and employees is our top priority. Whilst returning to face-to-face events, we continue to actively monitor the situation regarding COVID-19 and follow the latest advice and guidelines issued by the Department of Health, the World Health Organisation and relevant State authorities. Please click here for a summary of the measures The Tax Institute has put in place to ensure the safety of attendees at our face-to-face events, along with helpful links to assist you in preparing for your attendance at them.

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

## Contact tracing

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

## Cancellation Policy

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

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

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

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

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

## Become a member

There is no better time than right now to join Australia's leading educator and professional association in tax and take advantage of the special new member introductory offer. For an additional \$340 on the member registration fee, you can become a member and obtain extended membership benefits until 30 June 2020. Member benefits include:

- *Taxation in Australia* journal
- *TaxVine* e-newsletter
- CPD event discounts
- Publications and tax product discounts

**For further information regarding this event, please contact the Events Team on 02 8223 0040 or email [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au)**

**For registration enquiries, please contact [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)**





THE TAX INSTITUTE

# 2021 National Superannuation Conference

## Registration form

41958 | 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

#### A Full conference registration: Virtual

	Member	New member*	Non-member
<b>Early bird registration</b> Received on or before 3 September 2021	<input type="checkbox"/> \$1,400	<input type="checkbox"/> \$1,740	<input type="checkbox"/> \$1,700
<b>Standard registration</b> Received after 3 September 2021	<input type="checkbox"/> \$1,600	<input type="checkbox"/> \$1,940	<input type="checkbox"/> \$1,900

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

Promotional code:

#### \*Become a member and save!

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

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

Find out more about membership at [info.taxinstitute.com.au/membership](http://info.taxinstitute.com.au/membership).

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

Signature:

Date of signature:

DD/MM/YYYY

### 2 Delegate contact details

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

Member no.:

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

First name:  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 Breakout session selection

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

#### Thursday, 7 October

- 11:00am–12:00pm ☐ Session 2A ☐ Session 2B
- 12:00–1:00pm ☐ Session 3A ☐ Session 3B
- 2:00–3:00pm ☐ Session 4A ☐ Session 4B
- 3:30–4:30pm ☐ Session 5A ☐ Session 5B

#### Friday, 8 October

- 11:00am–12:00pm ☐ Session 9A ☐ Session 9B
- 12:00–1:00pm ☐ Session 10A ☐ Session 10B
- 2:00–3:00pm ☐ Session 11A ☐ Session 11B

4

## Payment summary

Registration fee

\$ 

Total payable

\$ 

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

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## 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](http://taxinstitute.com.au/professional-development/event-policy).

## Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at [www.taxinstitute.com.au](http://www.taxinstitute.com.au). [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

## TO REGISTER

🔗 Online [taxinstitute.com.au//2021NatSuper](http://taxinstitute.com.au//2021NatSuper)@ Email [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

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

☎ Fax 02 8223 0077





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[taxinstitute.com.au](http://taxinstitute.com.au)