2020 Barossa Convention

30 April – 2 May 2020 | Novotel Barossa Valley Resort

11 CPD hours

Welcome

To "The Great Taxby" Barossa Convention – "It's Tax Time Old Sport"

It is with great pleasure that I extend a warm welcome to you to join us in the picturesque surrounds of the historic Barossa Valley for The Tax Institute's 2020 "*The Great Taxby*" Barossa Convention. This event has a rich history and tradition which makes it South Australia's premier event for tax professionals who predominantly practice in the SME space. Just like Gatsby's parties there's ample reason to attend. The Convention offers delegates an opportunity to keep up to date, gain technical knowledge and hear practical insights from a range of high calibre local and interstate speakers, all while earning valuable CPD hours.

I would also like to take this opportunity to thank all our speakers who have generously agreed to volunteer their time to share their expertise.

High Quality Program

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

Excitingly, we have distinguished keynote speakers headlining the program who will provide their insight into two critical matters affecting SME clients: Michael Flynn QC will draw on his unrivalled expertise in his keynote *Decoding trust income* focusing on the relationship between trust law income and taxable income. With 100A Guidelines on the horizon, Michael Butler will then explore *The increasing use and threat of Section 100A* through case study examples. In the following program, we'll cover hot topics such as *State taxes – Change is now!* and *Employee obligations – Is anyone getting it right?* Perennial favourites, *Corporatising the SME group* and *Use and abuse of Testamentary Trusts* will be covered, and then we'll round out the Friday with two key practical sessions – *The world's greatest tax admin session* and a case study *on the Accidental property developer*.

A 'Succession Saturday' will close the program with an in depth look at *Buy Sell agreements as estate and succession planning tools* and *Transition to retirement, a critical window of opportunity*.

Unique Industry Networking and Idyllic Destination

This year we're excited to be heading to Saltram Winery for "*The Great Taxby*" Friday Gala Dinner, here you'll take in 160 years of heritage in the original refurbished winery including a tasting at the cellar door and great entertainment. Combine this with the ever-popular Thursday reception including SA's best fresh produce, and there's plenty of opportunity to meet up with friends and peers, old and new, from accounting, law, financial services and regulatory backgrounds, while in the Barossa Valley, an iconic destination for interstaters and locals alike.

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

Don't hesitate – book now to take advantage of early bird registration offers and ensure 2020 is the year you visit the Barossa.

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

Raoul Stevenson, CTA
Chair, 2020 Barossa Convention Organising Committee

Thank you

The Tax Institute gratefully acknowledges the generous assistance of members of the 2020 Barossa Convention Organising Committee:

Raoul Stevenson, CTA, *Nexia Edwards Marshall*
Matthew Andruchowycz, CTA, *Kovich & Co*
Leo Efthivoulou, CTA, *ENA Law*
Melissa Harrison, *Australian Taxation Office*
George Hodson, CTA, *Thomson Geer Lawyers*
Francis Loh, CTA, *Evans + Ayers*
Andrea Michaels, CTA, *NDA Law*
Andrew Nicola, CTA, *William Buck*
Neil Oakes, CTA, *Perks*
Tom Paltridge, CTA, *Grant Thornton*
Nicole Peterson, CTA, *PKF Adelaide*
Peter Slegers, CTA, *Cowell Clarke*
Ben Turner, FTI, *EY*

Technical program

Day 1 – Thursday, 30 April 2020

Time	Session	Presenter
3.00–4.50pm	**Registration**	
4.50–5.05pm	**Welcome and Opening Address**	**Raoul Stevenson, CTA** Nexia Edwards Marshall **Peter Godber, CTA** 2020 President, The Tax Institute
5.05–6.00pm	**Session 1: Keynote: Decoding trust income** The pathway that the trustee and its advisers must navigate in order to distribute the trust income to achieve the desired tax outcomes and attributes for the intended beneficiaries is often complex. This session will cover: — Ongoing discrepancies between trust income and tax net income and how the courts have been dealing with the issues post Bamford ie Greenhatch, Forrest — Challenging trust streaming issues (franked dividends, capital gains and general streaming) — How the Courts have defined "income of a trust estate" including latest case law developments — Income equalisation clauses, income re-characterisation clauses and other important trust powers — Matters to consider when drafting trustee resolutions — Default beneficiaries and vesting	**Michael Flynn QC CTA (Life)** Owen Dixon Chambers West
6.00–7.00pm	**Session 2: "Try again old sport" – The increasing use and threat of Section 100A** The ATO's increasing compliance activity around section 100A has serious implications for every day clients. But the legislation has not changed – so why the change in administration? Advisers await the ATO's new ruling with great anticipation. This session will look at what section 100A is really about, including the "original family dealing" exception, and whether the ATO's increased activity is justified. In particular this session will: — Examine the "state of the [tax] Nation" in Australia in June 1978 when the Government first announced the introduction of section 100A — Provide a summary and overview of section 100A's provisions — Review the origin of the expression "ordinary family and business dealing" and the difficulties associated with identifying "ordinary" family dealings — Refer briefly to the cases that have considered section 100A — Hypothetically ask how the great Lord Denning M.R. would approach the issue in 2020 — Discuss the ATO's public statements and examples regarding section 100A, including the new ruling expected before the Barossa Convention — Conclude with some observations on the possible way forward	**Michael Butler, CTA** Finlaysons
7.00pm	**Welcome reception at the Golf Clubrooms, proudly supported by Wine Direct**	

Technical program continued

Day 2 – Friday, 1 May 2020

Time	Session	Presenter
8.30 – 9.30am	**Session 3: Employee obligations – Is anyone getting it right?** Why employers are struggling to pay employees their dues and the associated tax risks in a STP world. All the latest and what you need to know about: — The changes to the reintroduced superannuation amnesty — The revived changes to CGT main residence exemption — Update on progress of the Board of Taxation Residency Review — Changes to super including OTE definition and opt-out for directors — Recent topical cases and ATO guidance	**Amanda Spinks** EY **Ben Turner, FTI** EY
9.30 – 10.15am	**Sessions 4: Corporate tax residency - There's no Australian tax payable … is there?** Your client has incorporated a company in a foreign country to make it easier for those customers to do business with them. It's actively carrying on a business in the country, so surely it just pays tax in that country – doesn't it? The High Court's decision in Bywater Investments Ltd and subsequent guidance issued by the ATO have fundamentally changed the way in which taxpayers and advisers should be approaching corporate tax residency matters. This session will outline the current state of play in relation to corporate tax residency, and provide some practical insights into the challenges facing companies today and how these challenges can be managed, including: — Tests for determining residency — Why tax residency is critical — Current ATO guidance and the Board of Tax Review — Treaty interaction — Governance implications — Do I need a travel budget for the directors?	**Tim Sandow, CTA** PwC
10.15 – 10.45am	**Morning tea proudly supported by Clifton Hall**	
10.45 – 11.45am	**Session 5: Corporatising the SME group** Partnerships and trusts have been a common feature of SME business structures. The reasons for adopting a corporate structure will be considered as well as an outline of the challenging tax issues associated with corporatising a structure. Through the use of practical case studies, technical issues that will be addressed include: — Optimising the use of CGT roll-overs — The impact that CGT roll-overs may have on forming a tax consolidated group — Emerging ATO views regarding "nothing else" type requirements in the context of CGT roll-overs — The availability of CGT discount on exit	**Julian Lian** KPMG

Day 2 – Friday, 1 May 2020 continued

Time	Session	Presenter
11.45am – 12.30pm	**Session 6: "They smashed up things and let others clean up the mess" – State taxes: Change is now!** After six months of noisy speculation and expectation – perhaps even hope – the provisions that will dictate the land tax fate of South Australian land holders from 30 June 2020 have now snuck through Parliament by the narrowest of margins. The ups and downs and ins and outs of the legislative process have been exhausting, and the raft of amendments on amendments has left many wondering whether they stand to win or lose under the incoming aggregation regime. This session will include discussions on the following land tax issues: — The various aggregation methods and rate scales — The impact of the provisions on individuals, companies, trusts and SMSFs — Law versus lore: uncertainties, ambiguities and drafting issues — The quiet amendments: non-aggregation related changes — An update on the Revaluation Initiative — Analysing the land tax pain scale The session will also include any pertinent developments in the areas of stamp duty (including the rewrite) and payroll tax.	**Lee Jurga** Perks
12.30 – 1.15pm	**Lunch**	
1.15 – 2.00pm	**Session 7: Privilege, I'd rather keep that to myself....** Clients receive advice in many different forms from professional advisers and they may sometimes wish to keep that advice to themselves. However, the Commissioner has extensive information gathering powers that are often far reaching and practical challenges can arise in responding to requests. This interactive session will explore typical scenarios that advisers and clients face from the perspective of both professional advisors and the ATO, including: — An overview of common misunderstandings of the accountant's concession and legal privilege — What advisors should be considering when advising their clients — Review of a typical set of documents held by advisers and their clients — What the ATO expects — Where it all goes wrong	**Danielle Ellershaw** Australian Taxation Office **George Hodson, CTA** Thomson Geer Lawyers **Yan Wong** Grant Thornton
2.00 – 2.45pm	**Session 8: "You can't live forever" – Use and abuse of Testamentary Trusts** The closure of another 'loophole' or was this one never actually open? 'Trust Stuffing' (as it has become commonly known) apparently caught the attention of the Government, so much so that in October 2019 draft legislation was released for consultation implementing integrity measures announced in the 18/19 Budget to 'improve the taxation of testamentary trusts'. In this session the following practical issues will be considered: — Day to day use and (potentially) abuse of Testamentary Trusts as it stands — The proposed amendments to Division 6AA and section 13 of the Income Tax Rates Act 1986 and how they might close a 'loophole' — Superannuation assets – are they 'out' or 'in'? — Capturing all intended beneficiaries (the 'bloodline issue') — The extensive use in the draft law of the words 'in the opinion of the Commissioner'	**Tom Pledge, FTI** Crawford Legal
2.45 – 3.00pm	**Afternoon tea**	

Technical program continued

Day 2 – Friday, 1 May 2020 continued

Time	Session	Presenter
3.00 – 3.45pm	**Session 9: The world's greatest tax admin session! – Issues in taxation administration** Hear from the authority on a range of administrative law issues arising in taxation administration with reference to reported cases. Topics include: — The Commissioner's powers of assessment/amendment — Dispute mechanisms, including merits review and judicial review — Jurisdictional issues — Discretions, settlements and penalties This session is key to giving you certainty and will save you days of research and confusion!	**Trevor Jones, CTA** Australian Taxation Office
3.45 – 5.15pm	**Session 10: "It takes two to make an accident" – A practical session for the accidental property developer** Your client holds property ripe for developing – what are the practical tax issues to be alive to and what are the decisions that need to be made? How can you achieve the optimal outcome for your client and minimise their tax risk exposure? Through a series of case studies, this session will consider: — Revisiting the revenue/capital distinction — When does property become trading stock? Delving into CGT Event K4 — Drawing a distinction between trading stock and emerging profits — GST considerations and effectively applying the margin scheme — Timing issues for land tax assessments — Depreciating assets, capital allowances and tenant fixtures (including agricultural improvements) — ATO data matching resources and recent trends	**Sarah Lennon, FTI** PKF **Joshua Pascale** Cowell Clarke
5.15 – 5.45pm	**Free time**	
5.45pm sharp	**Bus departs for "*The Great Taxby*" Gala Dinner**	
6.15pm	**Wine tasting at Saltram Cellar Door**	
7.00 – 10.30pm	**Join us for the "*The Great Taxby*" Gala Dinner at Saltram Winery** Proudly supported by Macks Advisory	
10.30pm	**Bus departs Saltram Winery for Novotel Barossa Valley Resort**	

The Great Taxby Gala – Friday, 1 May 2020

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

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

Venue:	Saltram Winery, Angaston Rd, Angaston
Time:	6.15pm – 10.30pm
Dress:	The Great Gatsby themed business attire
Transport:	Bus transfer available (see registration form part 5)
Price:	Included for full registration delegates (see registration form part 4)
Additional tickets:	$150pp

Day 3 – Saturday, 2 May 2020

Time	Session	Presenter
9.00–9.45am	**Session 11: "So we beat on, boats against the current" – Buy sell agreements as estate and succession planning tools** Planning transfers of equity between unrelated proprietors in the event of their death or disability is fraught with tax complexities. Fortunately, many traps with buy sell agreements have already been identified and there are pathways to consider. But let's not stop there. The owners are often trustees of discretionary trusts and if we are to look after their families, there might be important issues to be addressed in the trust deeds, trustee constitutions and family agreements. Paul will demonstrate how taking a holistic approach can add value and still be practical. — Buy-sell agreements – triggers, tax effective options and tips — Appointors, shareholders and directors of trustee companies - expertise and authority, considerations for each option — Amending deeds and replacing appointors – lessons from Mercanti — Shareholder agreements and constitutions – what to consider and getting it right to avoid pain and confusion	**Paul Hockridge, CTA** Mutual Trust

9.45–10.45am	**Session 12: "They did not know his dream was already behind him" – Transition to retirement, a critical window of opportunity**
	For private clients, and in particular business and farming clients, the "transition to retirement" phase is generally the most exciting and significant phase from a tax and succession perspective. Retirement changes the way important tax concessions apply. It opens the window to once-off opportunities and shuts the window on others. Advisers can add great value through this period, and can also be criticised for their clients missing the boat. This session will demystify and provide a checklist of the most critical issues, including:
	— The important tax implications of ceasing to carry on a business
	— The tax meaning of carrying on a business (e.g. share farming?), gainful employment (e.g. community work?) and retirement (e.g. slowing down?)
	— The small business CGT concessions (and restructure roll-over) ticking time bomb:
	  – $2m turnover test
	  – Businesses winding down
	  – 'In connection with retirement'
	— Bonus 'CGT cap amount' superannuation contributions
	— Access to superannuation benefits and related opportunities
	— Timely restructure and succession transactions
	— The family farm stamp duty exemption, farm management deposits and more
		David Nelson
		NAB
		Sally Storey, CTA
		Brentnalls
		Matthew Andruchowycz, CTA
		Kovich & Co

10.45–11.00am	**Business Alliance Partners acknowledgements and prize draw** **Convention close**	**Raoul Stevenson, CTA** Nexia Edwards Marshall **Peter Slegers, CTA** Cowell Clarke

Lead the way in tax

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For an additional $340 on the member registration fee you will receive membership until June 2021.

Member benefits include:

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

Become a member

See registration form for details.

Presenter profiles

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

Michael Butler, CTA, is the Partner in charge of the Finlaysons Tax & Revenue Group. Michael advises domestic and foreign clients on federal, international and state tax matters, and has a special interest in property taxation, corporate restructurings, small business CGT reliefs, cross-border investment, trusts, and estate & succession planning. Michael is a past chair of The Tax Institute's South Australian State Council and a regular contributor to Institute events.

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

Michael Flynn QC CTA (Life), is a Barrister at Owen Dixon Chambers West, specialising in taxation, and was National President of The Tax Institute in 2014. He is the author, with James Kessler, QC, of Drafting Trusts and Will Trusts in Australia (2nd edition, 2017). Michael has appeared in the Administrative Appeals Tribunal, the Federal Court and the High Court in taxation cases. Michael has been a member of various committees of The Tax Institute for over 20 years.

Paul Hockridge, CTA, is Tax Advisory Partner at Mutual Trust, Australia's leading multi-family office. He has worked for the ATO, a large law firm, has been a partner in medium and Big 4 chartered accounting firms and has over 30 years' experience in tax, asset protection, estate and succession planning. Paul's niches include litigation support, property development and FBT and salary packaging. Paul specialises in advising high wealth families and closely held businesses, as well as providing support for a number of accounting and law firms. Paul maintains a practicing certificate as a legal practitioner in Victoria, is a fellow of both CPA Australia and Chartered Accountants Australian and New Zealand, is senior fellow and teaches in the Masters program in the Law School at the University of Melbourne and is a chartered tax adviser. He sits on The Tax Institute's FBT and Employment Taxes Committee and contributes to The Tax Institute's book, Estate and Business Succession Planning. Perhaps Paul is best known as a regular presenter at local, State and National Tax Institute conferences.

George Hodson, CTA, is a Partner at Thomson Geer. George advises on a range of taxation, transactional, business structuring and tax controversy matters. He acts for a range of private, public and government clients and works closely with businesses, high net worth groups, not-for-profits, accountants and other professional advisers. He has extensive experience in taxation advisory as well as dispute resolution with revenue authorities. George presently sits as the chair of the SA Technical Resource Committee and on the National Dispute Resolution Committee with The Tax Institute.

Trevor Jones, CTA, is an Assistant Commissioner in Melbourne with over 40 years' experience at the ATO. His work presently covers a range of areas, including tax avoidance schemes, penalties, periods of review and disputes work including objections, litigation, settlements and dispute resolution.

Lee Jurga, is a Senior Taxation Specialist in the Tax Consulting Team at Perks in Adelaide. He has 13 years of both private and public sector experience advising on State and Federal taxation issues and has recently returned to private practice after managing the land tax assessment team within RevenueSA. He advises SME and high net worth individuals on a range of tax effective strategies from both a State and Federal tax perspective.

Sarah Lennon, FTI, is a Manager at PKF Kennedy where she has worked in professional services for the past 14 years. Sarah works in our taxation and business services with an interest in property and superannuation taxation and interest in the manufacturing, primary production and property sectors.

Julian Lian, started in KPMG's Adelaide tax practice as a graduate. He has recently returned to Adelaide after a number of years in Sydney where he worked with KPMG's tax advisory team and a leading Australian law firm. He advises on income tax matters and has a broad range of experience including restructures and mergers and acquisitions. His most recent TIA presentation was at the Queensland Tax Forum this year where he presented on technical traps in corporate transactions.

David Nelson is Principal of NAB Financial Planning Adelaide. David has over 10 years of financial planning experience and is a Member of the Financial Planning Association. He has worked on four continents in the wine industry and developed a strong appreciation for large corporations and international banking. David developed a passion for investment markets while overseas. This led him to completing two graduate diplomas and pursuing a role with NAB, who have a strong connection to agriculture. He has long believed that the greatest success, would be to find a path for farmers to transition from one generation to the next. David uses his experience and personal insights to help in developing unique strategies for generational transition, retirement and exit strategies.

Joshua Pascale, is an Associate in Cowell Clarke's Tax and Revenue and Superannuation Groups. Josh advises property and business owners on a wide range of federal and state tax law issues, as well as pertinent superannuation and commercial law matters. Josh has developed a particular interest in group restructures and the associated succession planning (private and business).

Tom Pledge, FTI, is a Partner of Corporate, Commercial and Construction Law Firm Crawford Legal. Tom has been a Fellow of the Tax Institute of Australia since 2004 and has experience advising a broad cross-section of large and small corporate businesses and high net worth individuals on commercial issues including in the areas of land tax and stamp duty and particularly in relation to complex land and business acquisitions, disposals, restructures, succession and estate planning, and estate administration.

Tim Sandow, CTA, is an experienced tax professional with 25 years in the 'Big 4', he provides income tax related advice to a variety of private and large public companies as well as multi-nationals. In particular, Tim has advised many companies on mergers & acquisitions, tax governance, corporate tax, international tax, and employment tax issues, always maintaining a focus on practical commercial advice. One of Tim's key skills is understanding complex tax issues and communicating these in a practical way enabling CFO's, Boards and Business Owners to focus on the key opportunities and risks when making business decisions. Tim is currently the SA representative on the National Board of The Tax Institutes.

Amanda Spinks, is a Director in the EY People Advisory Services Practice, with almost 15 years of experience, specialising in Employment Taxes. Amanda works with her clients to focus on the taxation implications of their people strategies. Amanda's key areas of speciality include advisory and compliance for payments to employees, directors and contractors, covering superannuation, PAYG withholding, fringe benefits tax and payroll tax.

Sally Storey, CTA, is passionate about helping small business and has broad experience in all areas of accounting, taxation and business advisory services. Sally is a member of Chartered Accountants Australia and New Zealand and a fellow of The Tax Institute. She has also completed her Masters in Applied Taxation and is a graduate of the Australian Institute of Company Directors.

Ben Turner, FTI, is a Senior Manager in EY's People Advisory Services team. Ben is a Chartered Accountant with over 13 years' experience specialising in taxation issues including expatriate taxation, Fringe Benefits Tax, superannuation/social security and payroll tax. Ben works closely with major organisations, particularly in the Human Resources and Finance areas to address remuneration and tax issues affecting the workforce. This includes designing effective processes, systems and tools to maximise planning opportunities and manage risks particularly with globally mobile workforces.

Yan Wong, has 25 years' corporate and international tax experience with Big Four and Mid-Tier International Chartered Accounting firms. Yan is a Chartered Accountant and practising tax lawyer. Yan delivers strong client service and commercially focused taxation advice to his clients particularly in the Food and Beverage and Professional Services sectors. He provides a versatile set of skills and experience in international tax/cross border tax advice, tax compliance and tax transaction/due diligence services. He is particularly experienced in leading teams consisting of international or indirect tax/transfer pricing specialists to provide comprehensive tax solutions to multinational client groups.

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

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Venue and accommodation

Novotel Barossa Valley Resort
42 Pioneer Avenue, Rowland Flat Barossa Valley

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

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

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

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

Getting to the Novotel Barossa Valley Resort

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

Social activities

Convention Welcome Reception
Thursday 30 April 2020

The Convention Welcome Reception Party is included in the registration fee for delegates attending the full convention. Join us for an evening of networking and a showcase Barossa's best food and wine at The Tanunda Pines Golf Club.

Convention Gala Dinner – "*The Great Taxby*"
Friday 1 May 2020

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

SA Tax Institute "Tour de Tax" bike ride
Thursday 30 April 2020

Participate in an organised 72-kilometre group bike ride from Adelaide (leaving Victoria Square at 11.30am) to the Novotel Barossa Valley Resort (Rowland Flat) via Gorge Road and a stop at Cudlee Creek (or for a shorter ride, join the peloton at Cudlee Creek). Arrival at the resort is timed for 3.30pm at the latest, well ahead of the 5.00pm convention start. Please indicate your interest on the registration form.

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

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

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

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

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

Event information

Registration options and inclusions

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

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

Register online at taxinstitute.com.au/2020barossa

Registration inclusions

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

Advance registration

All registrations received and paid for on or before Friday 14 February 2020 will be entitled to the advance registration rate.

Early bird registration

All registrations received and paid for in full by Friday 20 March 2020 will be entitled to the early bird rate.

Mates rates

Introduce and register a colleague who has not previously attended the Barossa Convention and we will extend to you the special rate of $1,335 (normally $1,585) – a saving of $250! This offer is only valid for registrations received before the close of the early bird offer, and both registrations must be received together (one registration must be a first-time attendee). This offer cannot be redeemed in conjunction with any other offer, promotional code or discount.

The 2020 Barossa Convention Event App

The registration fee includes electronic access for delegates to download all available presenter materials and event information prior to the event. The 2020 Barossa Convention Event App will contain session and presenter information, event materials, sponsor offers and other relevant event information. Email notification will be sent to all registrants in the weeks prior to the convention.

CPD accreditation

Attendance at the convention counts for 11 hours Continuing Professional Development Accreditation with The Tax Institute.

Business Alliance Partners

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

Dress code

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

Wi-Fi

Internet access will be available for convention delegates using a dedicated access code, provided to delegates on registration. Wi-Fi is accessible in the function foyer and conference rooms from 2.00pm Thursday 31 April to 11.00am Saturday 2 May 2020.

Alteration and cancellation policy (including changing or transferring sessions)

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. It is a condition of acceptance of registration that an administration fee of 20% of the registration fee will be charged for cancellation by delegates. Cancellations must be received in writing by The Tax Institute at least five working days prior to the event. No refund will be given for cancellations received within five working days of the event; however, 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. All accommodation booked through The Tax Institute will be non-refundable in the case of cancellation. The Tax Institute reserves the right to alter any part of the program at any time without notice.

THE TAX INSTITUTE

The 2020 Barossa Convention
Registration form

40616 | 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

Full conference registration

	Member	New member*	Non-member	Regional-member
Advance registration Received on or before 14 February 2020	☐ $1,485	☐ $1,825	☐ $1,905	☐ $1,190
Early bird registration Received on or before 20 March 2020	☐ $1,585	☐ $1,925	☐ $2,005	☐ $1,270
Standard registration Received after 20 March 2020	☐ $1,685	☐ $2,025	☐ $2,105	☐ $1,350

☐ **Mates rate promotion**** $1,335

Name of new attendee:

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

☐ **Accompanying person**# $400

Name of new attendee:

Dietary requirements:

** Mates rate details can be found on page 12.

Accompanying persons (non-delegates) registration includes all morning and afternoon teas, lunch on Friday and dinner on Thursday and Friday evenings.

Promotional code:

***EVENT AND MEMBERSHIP OFFER**

If you are not a member, bundle your membership with your registration. You will receive the member rate for registration and pay only $340 for membership through to June 2021.

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character and 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 Date of birth: DD/MM/YYYY

First name: Last name:

Position: Company:

Address:

Suburb: State: Postcode:

Telephone: 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 Optional activities selection

SA Tax Institute "Tour de Tax" bike ride – Thursday 30 April 2020 (11.30am–3.30pm) This activity is INCLUDED in the delegate registration fee.

☐ Yes, I wish to participate in the organised 72-kilometre bike ride from Adelaide to the Novotel Barossa Valley Resort

☐ Yes, please contact me to arrange luggage transportation to the convention venue (additional costs may apply)

4 Convention Dinners

The Thursday Welcome Reception and Friday Gala Dinner are BOTH INCLUDED in the full convention registration fee for delegates.

I WILL be attending the Welcome Reception Cocktail Party on Thursday 30 April 2020 ☐ Yes ☐ No

I WILL be attending the Gala Dinner on Friday 1 May 2020 ☐ Yes ☐ No

Additional tickets^	Cost	No.of tickets	Sub-total
☐ Yes, I require additional tickets to Thursday Welcome Reception Cocktail Party	$150		$
☐ Yes, I require additional tickets to Friday Convention Gala Dinner	$150		$

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

5 Convention Dinner transportation

The Friday Convention Gala Dinner bus transfer to Saltram Winery is INCLUDED in the registration fee for full convention delegates.

Friday 1 May: Pick up from Novotel Barossa Valley Resort

- ☐ Yes, **I WILL** require the return bus transfer to the convention dinner **OR**
- ☐ No, **I WILL NOT** require the return bus transfer to the convention dinner

6 Accommodation

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

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

Arrival date: DD/MM/YYYY Departure date: DD/MM/YYYY Total number of people in room:

Sharing room with:

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

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

7 Payment summary

Registration fee	$
Additional Thursday welcome reception tickets ($150 each)	$
Additional Friday gala dinner tickets ($150 each)	$
Total payable	$

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

8 Payment method

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

Name on card:

Card no.: Expiry date: MM/YY Cardholder's signature:

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

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

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

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTIs 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/2020barossa

Mail L37, 100 Miller Street, North Sydney NSW 2060

Email customeradmin@taxinstitute.com.au

Fax 02 8223 0077

Stay and play in the world famous Barossa Valley

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

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

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

Experience some Barossa adventure

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

Soak up some history

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

Art Lovers

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

THE TAX INSTITUTE

Tel 02 8223 0000
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For information, please contact SA team
at sa@taxinstitute.com.au

taxinstitute.com.au

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