

2020 South Australian Tax Intensive

19 – 20 November 2020 | Mount Lofty House | 9 CPD hours

Welcome

I invite you to join South Australia's preeminent tax advisors and emerging leaders at this year's Tax Intensive to be held at the idyllic Mount Lofty House on November 19 and 20.

The Tax Intensive remains one of SA's best renowned Tax Technical events with small, highly interactive discussion groups working through highly topical and practical case studies relevant to SME clients.

This unique training opportunity for SA tax advisers consists of three presentations by nationally recognised subject matter experts. Following their overview of the relevant legislation and issue, the presenters will guide attendees through an interactive case-study led workshop. This hands on approach will equip participants with the practical knowledge they need to provide immediate value to their firm and clients.

The 1.5 day program consisting of three seminars in case study format will provide attendees with the in depth technical knowledge and skills to advise their SME clients on the issues they face on a daily basis.

Attendees can choose a number of registration options including full event registrations, single session registrations or purchasing an employer ticket to share among their firm. We are also live streaming the sessions so that you can participate remotely if you prefer.

There'll be plenty of opportunity for networking too over the evening cocktail function, lunch and other break periods in the surrounds of the Adelaide Hills. There's also the option to stay for dinner and overnight to make the most of the experience.

Most importantly, I sincerely thank the organising Committee and presenters for committing their time and expertise to deliver what promises to be an excellent program.

I look forward to seeing you at Mount Lofty House in November.



Raoul Stevenson, CTA

Chair, 2020 South Australian Tax Intensive Organising Committee

The 2020 SA Tax Intensive is proudly sponsored by



The Tax Institute gratefully acknowledges the generous assistance of members of the 2020 SA Tax Intensive Organising Committee:

Raoul Stevenson, CTA, Nexia Edward Marshall

Ben Turner, FTI, EY

Peter Slegers, CTA, Cowell Clarke

Rebecca Smith, Bentleys

Technical program

Day 1 – Thursday, 19 November 2020

Time	Registration	Presenter
2.00 – 2.25pm	Registration	
2.25 – 2.30pm	Welcome by Chair	Raoul Stevenson, CTA
2.30– 5.30pm	Session 1: Structuring for Property Development Given the recent land tax reform and evolving property environment this session will consider structuring property ownership arrangements including exploring: <ul style="list-style-type: none"> – Ideal ownership structures for acquisition and development, including development for sale versus development for rent and revenue/capital account considerations. – Use of rollovers to convert long term passively-held property into a structure appropriate for development. – Use of bare trusts to avoid double duty on subdivision arrangements. – Issues for SMSFs in developing property. – SA land tax reforms including residential developers concession, beneficiary nominations and other significant issues. 	Workshop Leader: Will Fennell Piper Alderman Workshop Facilitators: Paul Carbone Grant Thornton Briony Hutchens DW Fox Tucker George Sinanis Grant Thornton
5.30–7.00pm	Networking Cocktail	
7.00pm	Dining Experience (Optional)	

Day 2 – Friday, 20 November 2020

Time	Session	Presenter
8.30–8.55am	Registration Open	
9.00 – 12.00pm	Session 2: JobKeeper Audit: We were eligible, weren't we? The ATO has commenced taking active steps to review JobKeeper claims including checking enrolments, seeking further information from clients and reviewing those enrolments that are of concern to the ATO. This will be a practical case-study to assist in developing an audit file for the ATO and aims to highlight key risks, common mistakes and what can be done to rectify errors. Specifically, this session will focus on: <ul style="list-style-type: none"> – appropriate documentation to support that turnover tests were met; – tricks and traps impacting ongoing eligibility; – navigating the grey areas of employee eligibility; – areas of focus and documentation requested by the ATO in an audit; The session will also consider the new requirements to qualify for the JobKeeper extension.	Workshop Leader: Jacqui Tucker, CTA KPMG Workshop Facilitators: Anna Chong, CTA KPMG Adrian Pennino, CTA KPMG Phil Shepherd, CTA KPMG Sonya Stirling ATO

Time	Session	Presenter
12.00 – 1.00pm	Lunch	
1.00 – 4.00pm	Session 3: 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 can be the catalyst for access to important tax concessions. It opens the window to once-off opportunities, but it can also shut the window on others. Advisors can add great value to clients through this period. This of course leaves advisors exposed to criticism when their clients miss the boat. This session will demystify and provide guidance on the most critical issues, including: <ul style="list-style-type: none"> – tax issues and consequences of retiring or ceasing to carry on business; – small business CGT concessions and restructure rollover rules (with a focus on the 15 year exemption and retirement exemption); – superannuation opportunities and challenges (such as working within the 'CGT cap amount'); – stamp duty considerations (including the family farm exemption); and – effective succession and estate planning strategies 	Workshop Leader: Ben Wilson, CTA CCK Lawyers Workshop Facilitators: Matthew Andruchowycz, CTA Kovich & Co Caitlin Ashworth CCK Lawyers Sally Storey, CTA Brentnalls
4.00–4.30pm	Networking	
4.30pm	Event Close	

Presenter profiles

Led by tax practitioners for tax professionals

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.

Caitlin Ashworth is a lawyer with CCK Lawyers. She practises largely in wills and estates matters. She also

has experience with tax, superannuation and commercial transactions. Caitlin works closely with clients to provide advice and solutions to meet their asset protection and tax planning objectives.

Paul Carbone is a Chartered Accountant and Senior Private Advisory Manager at Grant Thornton. Paul has over 9 years' experience working closely with a wide range of SME and high net worth individuals to provide commercially focused strategic and taxation advice. Paul has broad experience advising on a range of tax compliance and advisory matters particularly in the Real Estate and Construction and Food and Beverage sectors.

Anna Chong, CTA, is national Head of Indirect Tax, KPMG Enterprise. She specialises in GST, Stamp Duty, Land Tax, Fuel Tax Credit and Wine Equalisation Tax with over 16 years of experience in providing indirect tax advisory and compliance services. Her practice covers a wide range of industry sectors from HNWIs and private clients to top ASX 200 companies and government agencies on financial services, infrastructure projects, property developments, cross broader transactions, mergers and acquisitions, and GST and Fuel tax compliance affairs. Anna is currently a member of the South Australian State Technical Committee and National GST Technical Committee of The Tax Institute

Will Fennell is a Partner at Piper Alderman who specialises in income tax, GST and stamp duties. Will leads the Adelaide tax practice but also collaborates nationally with colleagues in his firm's Melbourne, Sydney and Brisbane offices. Will has had significant experience with the taxation of emerging technologies including working on a number of "initial coin offerings". Will has a Master of Tax from Melbourne University.

Briony Hutchens, CTA, is a Director in DW Fox Tucker's specialist Tax team, acting on behalf of a wide range of clients on matters ranging from one-off, large and complex matters to those encountered on a daily basis. She advises on most areas of state and federal taxes including business structuring issues; state taxes, including stamp duty, land tax and payroll tax; taxation disputes (state and federal); trusts; self-managed superannuation funds; property and joint venture projects; estate and succession planning and all aspects of commercial transactions. Briony is a Chartered Tax Adviser and holds a Master of Taxation (UNSW). She is recognised in Best Lawyers Australia for her expertise in wealth management and succession planning.

Adrian Pennino, CTA, is a Senior Tax Manager of Employment Taxes & Reward at KPMG. He specialises in advising clients in relation to planning opportunities to minimise tax and compliance costs for all employment taxes (fringe benefits tax, PAYG withholding, superannuation, workers compensation and payroll tax). He has been providing advice to a wide variety of clients, from the not-for-profit sector

to large corporates and government since 2010 including in relation to employee reward programs. Adrian has assisted clients with external reviews and audits conducted for payroll tax in most jurisdictions nationally and ATO investigations of client FBT, superannuation and contractor arrangements.

Phil Shepherd, CTA, is a Director at KPMG and a tax specialist working primarily with middle market corporates and large family groups. Advising clients on a variety of tax issues, his skills and expertise include mergers & acquisitions, tax effective structuring and estate planning strategies. Phil is a CTA of the Tax Institute and a member of the Institute of Chartered accountants.

George Sinanis is a Senior Tax Manager at Grant Thornton. George has over 8 years' experience, assisting clients with their tax compliance obligations and the provision of general advice relating to tax issues associated with transactions. In addition to general tax compliance and advisory, George has extensive experience in taxation due diligence, remuneration structuring and FBT.

Sonya Stirling is an ATO Director providing technical and case leadership advice with a view to minimising the administrative burden for taxpayers and avoiding disputes. Sonya joined the ATO in 1998 and was admitted in 2006. She has worked across all aspects of tax administration including Business Tax Reform – working on the Entity Tax Regime and the market valuation aspects of Consolidations and Financial Crime as part of Project

Wickenby (during which she was seconded to ASIC). Sonya is currently working with the ATO's Small Business, Business Line. Sonya is a regular speaker at ATO, Tax Institute and external events.

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.

Jacqui Tucker, CTA, is the national Head of Employment Taxes & Reward, KPMG Enterprise, and has substantial experience advising a wide range of clients on expatriate and employment taxes, and designing and establishing employee reward programs. Jacqui advises extensively on employer obligations including FBT, payroll tax and superannuation, with a focus on policy, process improvement, and cost savings. Jacqui represents KPMG and The Tax Institute on the ATO's Client Engagement Group relating to Single Touch Payroll in Australia.

Ben Wilson, CTA, is a partner with CCK Lawyers. He has a wide range of experience in corporate and commercial transactions and in advising clients on estate planning and business succession planning issues. He acts for high net wealth individuals, family groups and large corporate entities with businesses in a range of industries.



Venue and accommodation



Image source: Mount Lofty House and Ben Goode

Venue Details

Mount Lofty House

1 Mawson Dr, Crafers SA 5152

The South Australian Tax Intensive will be held at Mount Lofty House, a historical country house overlooking Piccadilly Valley in the Adelaide Hills wine region. The Mount Lofty Summit lookout is just 450 m from the property. The beautifully restored Mt Lofty House - MGallery Collection is set on 18 acres of native gardens and English-style rose gardens.

Parking

Free on-site parking is available.

Accommodation

Take the opportunity to stay at Mount Lofty House during the SA Tax Intensive. Contact Mount Lofty House directly on and let them know that you are apart of The Tax Institute.

Networking Cocktail Party

Thursday 19 November from 5.30pm – 7.00pm. Price: Inclusive in full registration. Additional tickets can be purchased for \$100 per person.

*Optional Dining Experience

Continue networking on Thursday evening with the option of a 2-course dinner in the private dining area of the Hardy's Restaurant from 7.00pm.

This dinner can be purchased at \$75.00 per person. You can opt in at the registration process.

(Drinks not included)

Accessibility and dietary requirements

Please indicate any special dietary requirements on the registration form and email us at sa@taxinstitute.com.au with any accessibility requirements.



Event information

	Online access to presentations and reference papers	Morning/Afternoon tea/Convention lunches	Networking Cocktail*
Full Tax Intensive registrations^ This registration option entitles one delegate to attend the entire event, a two-day technical program.	✓	✓	✓
Employer ticket This registration option allows one full registration to be shared between multiple attendees (max 3) from the same firm.	✓ Applicable to selected day only	✓ Applicable to two attendees only	✓ Applicable to one attendee only

Registration inclusions

Full registration includes participation in the full technical program from 2.30pm on Thursday, electronic access to all available materials via The Tax Institute CPD app, attendance at the cocktail party and all lunches and refreshments during conference hours. Registration fees do not include travel, accommodation, dinner options or hotel incidentals.

Employer ticket

This registration option allows one full registration to be shared between multiple attendees (max 3) from the same firm. Attendance at any session of your choice includes soft copy materials, Thursday Cocktail Party for one attendee, Friday lunch for two attendees and session refreshments.

Confirmation of registration

On receipt of your completed registration form and payment, you will be sent an email containing your confirmation letter and tax invoice.

The 2020 SA Tax Intensive Event Hub App

The app will be accessible for delegates to download all available presenter materials and event information one week prior to the event. The event hub will contain session and presenter information, delegate list, technical materials and other relevant event information.

CPD accreditation

Attendance at the Tax Intensive counts for 9 hours Continuing Professional Development Accreditation with The Tax Institute.

Delegate list

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

Dress code

Smart casual attire is suitable for the duration of the Tax Intensive

Wi-Fi

Internet access will be available for convention delegates using a dedicated access code, provided to delegates at registration and via the CPD app.

Alteration and cancellation policy

The Tax Institute reserves the right to alter any part of the program at any time without notice. It is a condition 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.

For further information regarding this event, please contact the State Office on 08 8463 9444 or sa@taxinstitute.com.au

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



THE TAX INSTITUTE

2020 South Australian Tax Intensive

Registration form

2020 South Australian Tax Intensive

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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 select your convention registration type: ☐ At Venue ☐ Streamed Online

A) Full Conference Registration

Standard registration ☐ Member \$1,070 ☐ Non-member \$1,560 ☐ *New Member \$1,410

B) Flexible single day registration

Thursday only**
Session 1 including Cocktail Party ☐ Member \$550 ☐ Non-member \$700

Friday only**
Session 2 & Session 3 ☐ \$850 ☐ \$1,050

C) Individual session registration

1 Session only** ☐ Member \$500 ☐ Non-member \$650

Please nominate the session you would like to attend _____

D) Employee Ticket ☐ \$1,500

Name of attendee:	Please select session:			**Attendance - Thurs Cocktail (1 inc), Friday lunch (2 inc)
	<input type="checkbox"/> 1	<input type="checkbox"/> 2^	<input type="checkbox"/> 3^	<input type="checkbox"/> Yes
	<input type="checkbox"/> 1	<input type="checkbox"/> 2^	<input type="checkbox"/> 3^	<input type="checkbox"/> Yes
	<input type="checkbox"/> 1	<input type="checkbox"/> 2^	<input type="checkbox"/> 3^	<input type="checkbox"/> Yes

**This registration includes one attendance at the Thursday Cocktail Party and two for Friday lunch. Additional tickets to the cocktail party can be purchased separately at a cost of \$100 per person, please see section 3 of this form.

Accommodation

Please contact Mount Lofty House directly for booking options and payments.

*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 the following year.

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

Networking Cocktail Party (Thursday 5.30pm – 7.00pm)

The cocktail party option is **INCLUDED** in the standard registration fee for delegates

- ☐ Yes, I WILL be attending the Networking Cocktail party
☐ No, I WILL NOT be attending the Networking Cocktail Party

Additional tickets for the Networking Cocktail Party:

- ☐ Yes, I require additional tickets for the convention dinner at \$100.00 per person

Number of additional tickets at \$100.00 per person	
Total amount	\$
Guest Name/s	

Dining Experience (Thursday 7.00pm)

The dinner option is **NOT INCLUDED** in the standard registration fee for delegates

- ☐ **Yes**, I WILL be attending the dinner on Thursday, 19 November at 7.00pm
☐ **No**, I WILL NOT be attending the dinner

Additional tickets for the Dinner Experience:

- ☐ **Yes**, I require additional tickets for the convention dinner at \$75.00 per person

Number of additional tickets at \$75.00 per person	
Total amount	\$
Guest Name/s	

Are there any dietary requirements needed for the registered delegate/s?

For event enquiries, please contact Sara Simpson on 08 8463 9444 or sa@taxinstitute.com.au. 9 CPD hours will be allocated to the designated attendee.

Payment Summary	
Registration fee	\$
Additional Networking Cocktail Tickets (\$100.00)	\$
Optional Dining Experience (\$75.00)	\$
Total	\$

2 Delegate contact details

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

Member no.: _____

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms

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 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.

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 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

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

☎ Fax 02 8223 0077