



THE TAX INSTITUTE



# SA Tax Forum

23–24 March 2022 | Adelaide Oval

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11 CPD hours

# Welcome

On behalf of the organising committee and The Tax Institute, it is our pleasure to invite you to the inaugural SA Tax Forum on 23-24 March 2022. Featuring an exciting new format, the event will be held in the idyllic surrounds of the Adelaide Oval, on the doorstep of Adelaide's CBD.

This event is set to become one of Adelaide's premier events for tax professionals and will provide a forum for delegates to stay up to date on the latest issues and connect with your peers.

## Why you should attend?

The 2022 program includes:

- An outstanding line-up of local and interstate speakers
- Practical technical sessions for tax professionals with an emphasis on "real-world" application
- Tailor your CPD journey with both a SME and Hot Topic stream
- Opportunities to network and exchange ideas with peers and tax experts, including the welcome reception at the Pavilion overlooking Adelaide Oval's historic arches.

The program covers a range of tax issues that confront us in the ever-changing environment we work in. With an emphasis on the practical resolution of issues, we'll look at such areas as the latest developments in structuring professional practices, hear about the challenging employment tax issues faced by employers operating a mobile workforce and provide advanced strategies for dealing with trust structures and small business CGT concessions.

The program will also provide an opportunity to learn about the important issue of mental health in the workplace.

Don't miss your chance to be part of this great event! I hope to see you there.



**Peter Slegers, CTA**  
Chair, SA Tax Forum Organising Committee

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*Early bird offer*  
*Register on or before Friday, 25 February 2022 to save!*

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# Program at a glance

## Plenaries

- Structuring professional practices – what now?
- Dealing with difficult structures – preparing for the future
- Mental health and our workplace
- Tax policy & advocacy update
- Division 7A

## SME

- Superannuation CGT cap planning – tips and traps
- SMSF – 2022 planning
- Succession planning for SMSF income streams – optimising the outcomes
- The cutting edge of small business CGT concessions – planning and traps
- Vesting trusts: The critical issues – Part 1 & 2

## Hot Topics

- Director's duties
- When do you need a FTE? The not so obvious issues...
- What employment tax issues do you need to be aware of?
- I don't just call Australia home – what it means for your individual tax return
- Estate administration – getting it right ...

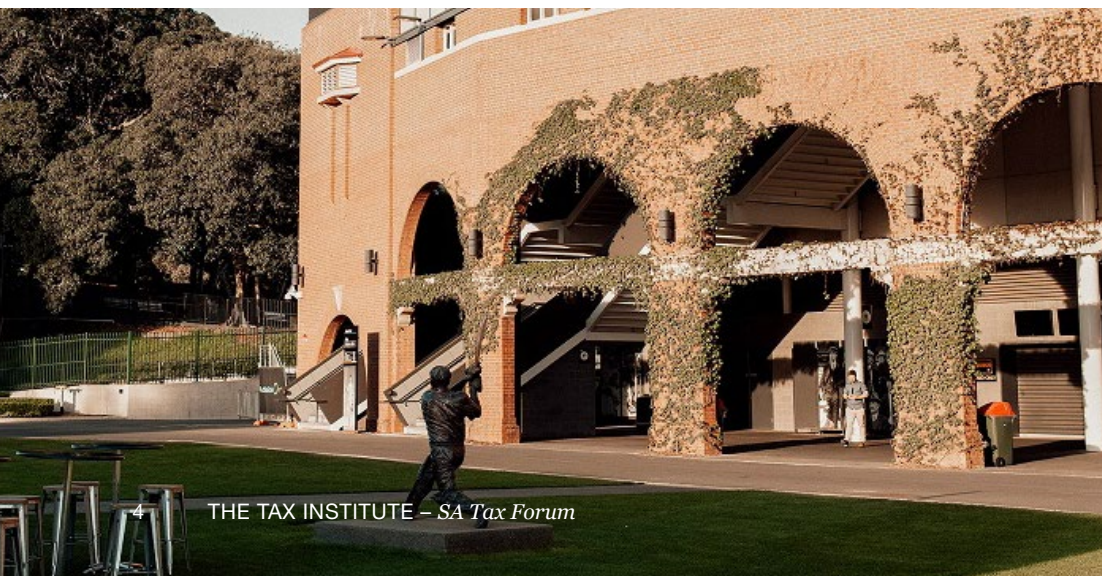




# Technical program

*Day 1 – Wednesday, 23 March 2022*

Time	Session	Presenter
8:00–8:55am	Registration	
8:55–9:00am	Welcome & opening	<b>Peter Slegers, CTA</b> Cowell Clarke
9:00–9:30am	<b>Session 1: Keynote address</b> This session will look at current business trends and address broader financial issues affecting businesses in SA.	<b>Martin Haese</b> <i>Chief Executive Officer</i> BusinessSA
9:30–10:30am	<b>Session 2: Structuring professional practices - what now?</b> With the ATO's Practical Compliance Guideline <i>PCG 2021/4</i> released only days ago (December 2021), what does this mean for your clients? This session will discuss the finalised ATO guidelines and what they mean in practice. It will also cover: <ul style="list-style-type: none"><li>— Statutory vs common law PSI (the Doctors' cases)</li><li>— Emerging practices with service entities</li><li>— Industry issues for medical and health professionals, lawyers and accountants</li></ul>	<b>Neil Oakes, CTA</b> Perks  <b>Paul Tanti, CTA</b> Thomson Geer Lawyers
10:30–11:00am	Morning tea	



# Technical program continued

## Day 1 – Wednesday, 23 March 2022 continued

Time	Session	Presenter
11:00am–12:00pm	<b>Session 3A: Superannuation CGT cap planning – tips and traps</b> Navigating the CGT small business concessions can often be a challenging exercise and even more so in the context of superannuation and retirement planning.  This session will explore the interactions between the superannuation CGT cap and the small business 15-year exemption and small business retirement exemption, and delve into the following: <ul style="list-style-type: none"><li>– Tips and traps for in-specie superannuation contributions</li><li>– Restructuring trust property into self-managed superannuation funds and</li><li>– Navigating South Australian stamp duty laws with respect to conveyances of qualifying land.</li></ul>	<b>Tasha Naige</b> DMAW Lawyers
OR	<b>Session 3B: Directors' duties</b> This session will cover: <ul style="list-style-type: none"><li>– The Director identification number</li><li>– Employment tax obligations for Directors fees</li><li>– Exploration of potential options to limit the damage when you've got it wrong and the rectification process</li><li>– Employment tax obligations/remuneration and</li><li>– PAYG/GST/Superannuation/Liabilities.</li></ul>	<b>Rosey Batt</b> Rosey Batt Associates
12:00–1:00pm	<b>Session 4A: SMSF – 2022 planning</b> The session will provide an update to current SMSF rules, focusing on what practitioners need to do with their SMSF clients prior to 30 June 2022. Topics covered will be <ul style="list-style-type: none"><li>– Contributions – what can be done?</li><li>– Benefits/Pensions – do I need to consider TBA changes?</li><li>– NALE – do we need to consider this?</li><li>– Superstream – is SMSF admin still easy?</li></ul>	<b>Shirley Schaefer</b> BDO
OR	<b>Session 4B: When do you need a FTE? The not so obvious issues...</b> This session will explain the main situations in which a family trust election may be required and sets out some of the not so obvious issues associated with making a family trust election.  The discussion will consider the following: <ul style="list-style-type: none"><li>– Franking credits</li><li>– 328G</li><li>– Income injection</li><li>– When the recipient trust isn't a beneficiary</li><li>– Issues with trust income generally</li></ul>	<b>Sonia Mascolo, CTA</b> Bentleys

# Technical program continued

## Day 1 – Wednesday, 23 March 2022 continued

Time	Session	Presenter
1:00–2:00pm	Lunch	
2:00–3:00pm	<p><b>Session 5A: Succession planning for SMSF income streams – optimising the outcomes</b></p> <p>With the continued proliferation of SMSFs paying income streams to members, advisers should be alive to the various succession planning issues and opportunities relating to income streams. Care is required in planning for the succession of income streams to ensure that clients' succession objectives can be achieved in a tax-effective manner. With these issues in mind, topics covered in this session will include:</p> <ul style="list-style-type: none"> <li>— Managing multiple income streams on death – which should be commuted and which retained?</li> <li>— Planning for the taxable and tax-free components</li> <li>— Reversionary pension planning and interface with the transfer balance cap regime</li> <li>— Specialised superannuation power of attorney arrangements and</li> <li>— Tailoring income streams to achieve tax and commercially effective outcomes.</li> </ul>	<p><b>Daniel Marateo</b> Cowell Clarke</p>
OR	<p><b>Session 5B: Employees are now working remotely around the world – what employment tax issues do you need to be aware of?</b></p> <p>Managing people remotely and globally in the wake of COVID-19 presents some challenges but also great opportunities.</p> <p>Organisations need to navigate these complexities and make the right decisions to secure and retain the right talent.</p> <p>Compliance is key and, in this session, we will consider the issues arising from various components of the Australian employment tax rules to assist you to navigate these complexities, including:</p> <ul style="list-style-type: none"> <li>— Australian tax residency</li> <li>— Key elements of Double Tax Agreements</li> <li>— Contractual obligations</li> <li>— Corporate tax exposure</li> <li>— Employer obligations (home &amp; host)</li> <li>— Work rights and other regulatory considerations and</li> <li>— The pitfalls and the opportunities.</li> </ul>	<p><b>Tim Cooper, ATI</b> PwC</p> <p><b>Natasha Wegener</b> PwC</p>
3:00–3:30pm	Afternoon tea	

# Technical program continued

## Day 1 – Wednesday, 23 March 2022 continued

Time	Session	Presenter
3:30–4:30pm	<p><b>Session 6: Dealing with difficult structures – preparing for the future</b></p> <p>When assisting clients on how to plan for the future, one usually begins with the end in mind, which incorporates focus on the “planned end” like a trade sale or family transfer while maintaining flexibility for the unplanned.</p> <p>Care needs to be taken when doing the ground work to ensure that clients can maintain and realise value both now and in the future. As well as addressing most of the income tax rollovers and concessions that are useful to help restructure value, this session will also consider:</p> <ul style="list-style-type: none"><li>— Intellectual property, social media and ownership</li><li>— Managing valuation issues involving complex structures taking into account cases, affiliates and connected entities</li><li>— Whether Subdiv 328-G helps in these situations?</li><li>— Buyer versus seller considerations.</li></ul>	<p><b>Linda Tapiolas, CTA</b> Cooper Grace Ward Lawyers</p>
4:30–5:30pm	<p><b>Session 7: Mental health and our workplace</b></p> <p>Exploring the Mental Health Landscape and its interaction with our workplaces.</p> <p>The session will detail the importance of looking out for ourselves, our family, our friends and our work colleagues and provide tips on how to start the conversations around mental health (often considered the hardest part).</p> <p>We will be discussing the reasons why we can all benefit from creating mentally healthy environments in our daily lives and how this can be achieved.</p> <p>Furthermore, in times of uncertainty, managing our own wellbeing is crucial and we will explore some tips and ideas on managing our own wellbeing and selfcare.</p>	<p><b>John Mannion</b> <i>Mental Health Commissioner</i> Breakthrough Mental Health Research Foundation</p>
5:30–7:30pm	<b>Welcome reception</b>	

## Welcome reception – Wednesday, 23 March 2022 | The Pavilion, Adelaide Oval

Join your colleagues and conference speakers for an evening of drinks, canapes and networking.

**Time:** 5:30–7:30pm

**Price:** Included for full registration delegates. Additional tickets are \$75 per person.

**Dress:** Business casual



# Technical program continued

## Day 2 – Thursday, 24 March 2022

Time	Session	Presenter
8:45–9:30am	<b>Session 8: Tax Policy and Advocacy update</b>	<b>Tax Policy and Advocacy team</b> The Tax Institute
9:30–10:30am	<b>Session 9: Division 7A</b> Division 7A is a topic for which every SME practitioner must have a working knowledge. However, there are flaws in some established practices for effecting the minimum annual repayment. This exposes your client – and you, the advisor – to risks. However, there are solutions, and simple ways of implementing them. This session is for practitioners of all levels of experience, and a good precursor to a future session on the long-awaited reforms to Division 7A. This session will cover the following: <ul style="list-style-type: none"><li>– Brief recap on why Division 7A exists</li><li>– Loan repayments by direct set-off against a dividend</li><li>– What if the minutes or dividend statement are prepared late?</li><li>– Compromise the minimum annual repayment?</li><li>– Loan repayments by round-robin set-off against a dividend</li><li>– Circular round of payments by journal entries</li><li>– Not legally effective payments – Division 7A breach!</li><li>– ATO's position</li><li>– Asset protection risk</li><li>– Solutions and</li><li>– Practical examples.</li></ul>	<b>Tim Edgecombe, CTA</b> BDO





# Technical program continued

## Day 2 – Thursday, 24 March 2022 continued

Time	Session	Presenter
10:30–11:00am	Morning tea	
11:00–12:00pm	<b>Session 10A: The cutting edge of small business CGT concessions – planning and traps</b> This workshop session will provide practical tips and tricks for planning your small business CGT concessions, with a focus on: <ul style="list-style-type: none"><li>– Payment of CGT exempt amounts: Dividend, capital distribution or non-deductible expense</li><li>– Is the liability “related” to the CGT asset for \$6M MNAV?</li><li>– Aggregated turnover: What income is derived from carrying on business and what income can be excluded?</li><li>– Extracting the proceeds of sale from unit trusts and companies tax effectively</li><li>– Tips and traps and</li><li>– War stories.</li></ul>	<b>Linda Tapiolas, CTA</b> Cooper Grace Ward Lawyers
OR	<b>Session 10B: I don’t just call Australia home – what it means for your individual tax return to be working globally</b> A nuts and bolts look at the different elements of your individual tax return depending on your Australian tax residency and residency for the purposes of any applicable Double Tax Agreement, with a focus on: <ul style="list-style-type: none"><li>– Employment income</li><li>– Rental properties</li><li>– Interest/dividends/trust income</li><li>– Tax Offsets (FITO, LITO, LMITO)</li><li>– Medicare Levy</li><li>– Cryptocurrencies</li><li>– Capital gains (including main residence exemption) and</li><li>– Common deductions.</li></ul>	<b>Matthew Fregona</b> KPMG
12:00–1:00pm	Lunch	

## Join the conversation



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# Technical program continued

## Day 2 – Thursday, 24 March 2022 continued

Time	Session	Presenter
1:00–2:00pm	<p><b>Session 11A: Vesting trusts: The critical issues – Part 1</b></p> <p>This topic will be explored over two sessions. Part 1 will provide an overview of the technical issues encountered when vesting trusts and will be followed by a practical case-studies based session.</p> <p>This session will discuss the following:</p> <ul style="list-style-type: none"><li>– Court jurisdiction to explore vesting issues</li><li>– Trust vesting</li><li>– Settlements of trust</li><li>– Duty/CGT triggering events</li><li>– ATO ruling and</li><li>– Amend the trust deed to have a different vesting period.</li></ul>	<p><b>Dr Philip Bender, ATI</b> Victorian Bar</p>
OR	<p><b>Session 11B: The next 5,000 program – what have we seen?</b></p> <p>The ATO's Next 5,000 tax performance program is now in its third year and has recently released its interim findings report. As part of the program the ATO focuses on whether wealthy private groups are paying the correct amount of tax. What do these insights mean for the program? How is the ATO engaging across this population and what does future engagement look like? Find out about what the ATO is seeing and observing about this population.</p> <p>This session will provide an overview and update on the following:</p> <ul style="list-style-type: none"><li>– Overview of the Next 5,000 program and how the ATO is engaging with these wealthy private groups</li><li>– Comparison between the Top 500 program and Next 5,000 program</li><li>– Insights and observations to date on tax governance, income tax and GST</li><li>– The ATO's current Next 5,000 program focus areas and most common issues being identified and</li><li>– Understanding of how we are working with Next 5,000 clients to resolve issues.</li></ul>	<p><b>Amy James-Velagic, FTI</b> <i>Private Wealth Assistant Commissioner</i> Australian Taxation Office</p>
2:00–2:30pm	<b>Afternoon tea</b>	

# Technical program continued

## Day 2 – Thursday, 24 March 2022 continued

Time	Session	Presenter
2:30–3:30pm	<b>Session 12A: Vesting trusts: the critical issues - Part 2</b> This session will use case studies involving a winery owning trust/company structure to explore some of the tax issues discussed in Part 1, that may arise in the lead-up-to, at, and after vesting, including <ul style="list-style-type: none"> <li>– How do we collapse the structure?</li> <li>– Generational change</li> <li>– Winding up the trust</li> <li>– Extending the vesting date</li> <li>– Possible tax implications:</li> <li>– CGT issues including events E1 and E2</li> <li>– CGT rollover relief</li> <li>– Dealing with UPEs (assets and obligations) and</li> <li>– Division 7A issues (including those that may arise from previous accounting treatment).</li> </ul>	<b>Neil Brydges, CTA</b> Sladen Legal
OR	<b>Session 12B: Estate administration – getting it right...</b> This session will highlight the key issues for Executors (and their advisers) when administering deceased estates with significant assets. Topics covered will include: <ul style="list-style-type: none"> <li>– Duties of Executors (under the general law and tax obligations)</li> <li>– Capital Gains Tax – when is it disregarded and when will it apply?</li> <li>– Capital Gains and Specific Entitlement Issues</li> <li>– Income – when is it taxed to the estate and when are beneficiaries presently entitled?</li> <li>– Taxation treatment of interim distributions</li> <li>– When is an Estate administered?</li> <li>– Testamentary trusts: the new derivation measures and distributing income to minors, and</li> <li>– Dealing with Inheritance Act/Succession Act claims</li> </ul>	<b>Caitlin Ashworth, FTI</b> CCK Lawyers <b>Ben Wilson, CTA</b> CCK Lawyers
3:30pm	<b>Closing address</b>	



# Presenter profiles

**Caitlin Ashworth, FTI**, is an associate with CCK Lawyers. She practises predominantly in estate and business succession planning, trusts, tax, superannuation and estate administration. Caitlin also has experience with general commercial transactions. Caitlin works closely with clients to provide advice and solutions to meet their asset protection and tax planning objectives.

**Rosey Batt** is CEO of Rosey Batt & Associates. She has over three decades of commercial legal experience, acting for Publicly Listed Corporations, SME's and individuals in complex litigation, commercial transactions and general advice. Prior to establishing Rosey Batt & Associates, Rosey spent a number of years as a partner at Minter Ellison and also spent time working in Europe. Rosey's has extensive board experience across a number of industries. Her expertise includes 15 years as facilitator of the AICD Flagship Company Director's Course. Rosey is a fellow of the AICD.

**Dr Philip Bender, ATI**, is a barrister at the Victorian Bar and member of Chartered Accountants ANZ. He is the author of Bender's Australian Stamp Duties, published by the Tax Institute. He acts in Federal and State taxation, superannuation, and trusts and estates matters for taxpayers and revenue authorities. In the trusts area, he has acted in many taxation disputes involving trusts issues, and has acted in many trusts matters involving, amongst other topics, trust deed and will

interpretation, alleged breaches of trust; trustee removal applications; judicial advice; charitable trusts; and superannuation death benefits disputes.

**Neil Brydges, CTA**, is a Principal Lawyer in Sladen Legal's business law area, with a particular focus on taxation advice and disputes. The client mix includes both family groups and business enterprises. Neil also regularly assists professional advisors, including tax agents, accountants and financial advisors, to understand complex legal issues and help them to better assist their own clients. Neil is a Chartered Tax Advisor with The Tax Institute and accredited as a specialist in taxation law with the Law Institute of Victoria. Since 2019 Neil has been named one of Australia's "Best Lawyers of the Year" in the practice of tax law. Neil was also recognised in Doyles Guide as a recommended tax lawyer in 2021.

**Tim Cooper, ATI**, is a Senior Consultant in PwC's People & Organisation business in the Adelaide office. He specialises in global mobility, employment tax and equity considerations, and works with national and multinational organisations as well as individual taxpayers. He is also an Affiliate Member of the Tax Institute.

**Tim Edgecombe** has over 15 years' experience in public practice with Chartered Accounting firms, including with Big 4 firms and continues to act as a consultant for several accounting firms, ranging from large second tier to sole practitioners.

Tim has significant experience in the tax issues encountered by small to medium enterprises and brings these practical insights to training presentations. He regularly presents tax related topics at a range of professional forums on behalf of other industry bodies. Tim is also involved with the presentation of Tax Masterclass material for CA candidates.

**Matthew Fregona** is an Associate Director in the Employment Taxes & Reward for KPMG Enterprise, and has over 10 years' experience advising a wide range of clients on expatriate and employment taxes. Matthew advises on employer obligations including FBT, payroll tax and superannuation. He has also spent time working in industry for OZ Minerals gaining valuable experience at a significant global entity. Matthew is also specialist in global mobility, dealing with employer obligations in relation to cross border transfers and individual income tax matters. Matthew has major clients in a wide range of industries including the defence, infrastructure, IT and wine industries.

**Martin Haese** is the Chief Executive Officer of Business SA, South Australia's Chamber of Commerce and Industry, Chair of the Premier's Climate Change Council (SA), and a founding member of the Federal Government's Australian Broadband Advisory Council. Martin is an entrepreneur, educator and strong advocate for Adelaide's standing as one of the world's most liveable cities. Martin co-founded the Entrepreneurs' Organisation in SA and has

taught entrepreneurship for MBA students across the nation. From 2010 to 2013, he headed the Rundle Mall Management Authority, where he enabled Rundle Mall's upgrade and provided advocacy and program support for 700 retailers. In 2014, Martin was elected as the 78th Lord Mayor of Adelaide, an office he held until late 2018. During this time, Martin initiated strong sustainability and technology agendas resulting in Carbon Neutral Adelaide 2025, Ten Gigabit Adelaide (one of the world's fastest fibre optic data networks), the purchase of the Le Cornu site in North Adelaide and the development plan for the Adelaide Central Market Arcade. Martin was a guest speaker at COP21 in Paris in 2015, the World Cities Summit in Singapore in 2018 and COP26 in Glasgow Scotland in 2021 and actively advocates that addressing climate change is both an environmental necessity and an economic opportunity for South Australia.

**Amy James-Velagic, FTI**, started her career in a large advisory firm in corporate tax. She then joined the Australian Taxation Office in 2010 and has worked in Large Business and Internationals business (now referred to as Public Groups and Internationals), Indirect Tax and Private Wealth (PW). Amy has experience in GST, transfer pricing, corporate and international tax matters. In her current role, Amy has responsibilities for PW engagement and assurance (Western Australia and South Australia), PW National GST, delivery of the Next 5000 program and ATO project lead for Loss Carry Back.



## Presenter profiles continued

**John Mannion** is the inaugural Executive Director of Breakthrough – Australia's only foundation dedicated solely to mental health research. John's career in mental health has spanned more than 30 years including as a practitioner as well as leading mental health services across the state. John led the establishment of Breakthrough in 2018 which this year alone funded more than 20 leading research projects across all the state's universities. These included projects in the areas of youth mental health, depression, indigenous mental health and eating disorders. He has also been appointed the state's newest Mental Health Commissioner. The role will be in addition to his commitment as Executive Director for Breakthrough where he looks forward to creating a life free of mental illness by focusing upon research to inform clinical improvements, enhanced outcomes and community connectivity.

**Daniel Marateo** is a Senior Associate in Cowell Clarke's Tax & Revenue and Superannuation groups. Daniel advises on and assists clients in dealing with revenue authorities in various areas of Federal taxation law and State revenue law across the Australian jurisdictions. Daniel also advises SMSF trustees and members on the taxation and regulatory issues associated with SMSFs, including where those issues interface with structuring for tax, asset protection and succession planning. Daniel is a co-author of the Tax Institute's SMSF Income Stream Guide.

**Sonia Mascolo, CTA**, is a Tax Director at Bentleys in Adelaide. Sonia advises clients in a wide variety of areas including tax technical business / structuring advice, succession planning and wealth management strategies, international tax issues, indirect tax and state taxes. She has tax experience working in the legal profession, the ATO, a big four firm as well as university lecturing and tutoring positions. Sonia joined TTI in 2012 and is a current member of the SA Technical Committee and was previously on the SA PD Committee.

**Tasha Naige** is a Principal at DMAW Lawyers and has specialist skills in financial services and superannuation law. She advises on the full range of superannuation-related matters for both large funds and self-managed superannuation funds. Tasha regularly provides investment structuring advice, compliance advice and death benefit planning and payment advice to trustees, including in complex areas. Tasha is a regular speaker at various tax and superannuation forums, including The Tax Institute.

**Neil Oakes, CTA**, is a Tax Director at Perks Chartered Accountants and holds a Masters Degree in Tax Law from UNSW (Atax). Neil currently heads up the Technical Tax consulting division within Perks. He specialises in providing commercially focused tax advice to a wide range of clients.

**Shirley Schaefer** is an auditor by training and a SMSF expert by choice. Shirley is a regular speaker at SMSF & Audit conferences. She provides SMSF competency training for accountants and auditors and is the co-author of the Thomson Reuters SMSF Audit Guide. She is an Accredited Specialist Adviser, Accredited Specialist Auditor and Fellow of the Self Managed Superannuation Fund Professionals Association of Australia (SMSFA); a Fellow of the Association of Superannuation Funds Australia (ASFA); a Fellow of the Institute of Chartered Accountants in Australia (ICAA), a Registered Company Auditor and a Registered SMSF Auditor.

**Paul Tanti, CTA**, is a partner in the Thomson Geer Tax Section and has a broad range of experience in providing specialist taxation and commercial advice to a wide variety of clients. His broad base of clients includes legal and accounting firms, private and listed companies, high net worth individuals, and private equity funds. Paul advises on all areas of Federal and State taxation law and related commercial matters. Paul is a regular speaker on tax and related commercial matters for various professional bodies. He is a member of The Tax Institute, a member of the Law Council of Australia's Business Law Committee (South Australian Tax Sub Committee), and a member of the South Australian State Taxes Liaison Group.

**Linda Tapiolas, CTA**, is a Partner in the Cooper Grace Ward Lawyers Commercial team. She provides a range of support services to accountants, financial planners and other professional advisers. This includes technical advice on complex tax, CGT and Div 7A issues, as well as acting on business sales and acquisitions to ensure clients achieve commercial and tax-effective outcomes. Prior to joining Cooper Grace Ward, Linda worked as an accountant for 18 years advising clients on capital gains, business acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions.

**Natasha Wegener** is a Senior Manager in PwC's People & Organisation business in the Adelaide office. She has over 20 years of experience working in tax. She specialises in the area of global mobility and Australian employment taxes and has worked for a global corporation, as well as professional services firms. She is also a member of the Australian and New Zealand Chartered Accountants.

**Ben Wilson, CTA**, is a partner with CCK Lawyers. He has a wide range of experience in corporate and commercial transactions, with a particular focus on taxation and revenue. Ben is an experienced tax adviser and advises clients on estate planning and business succession planning issues. He also acts for executors of wealthy and complex deceased estates and advises on the complex taxation and administration issues that arise in such estates.

# Venue and accommodation

## Adelaide Oval

War Memorial Dr, North Adelaide SA 5006

Adelaide Oval is situated right in the heart of the city, framed by the River Torrens and surrounding precinct. Whether you're travelling by car, bus, train or tram, Adelaide Oval's close proximity to the CBD makes it easily accessible.

## Getting there

Adelaide Oval is situated right in the heart of the city, framed by the River Torrens and surrounding precinct and is a short 6kms from Adelaide airport.

If travelling from interstate on the morning of the event, delegates can take advantage of a plethora of travel options, including bus, taxi, shuttle or town-car.

## Accommodation

### Oval Hotel

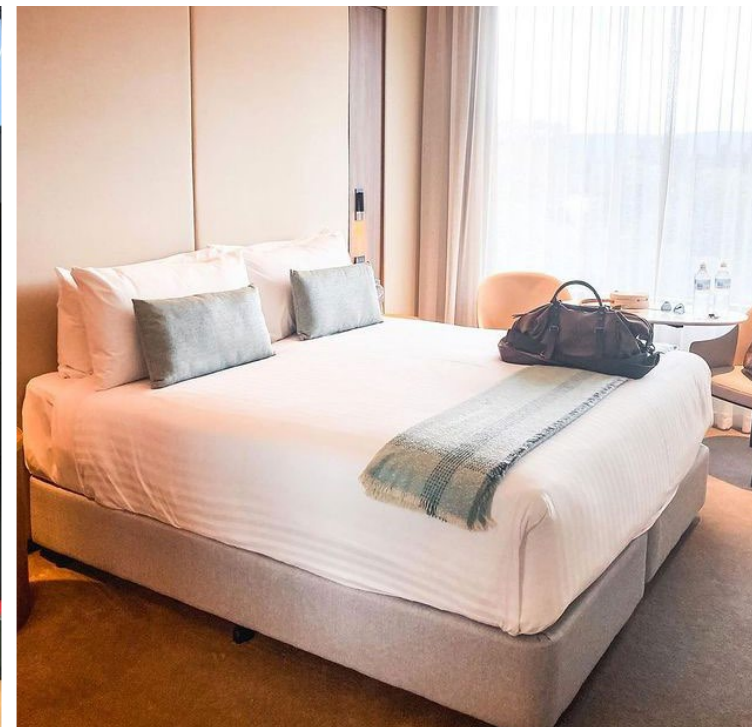
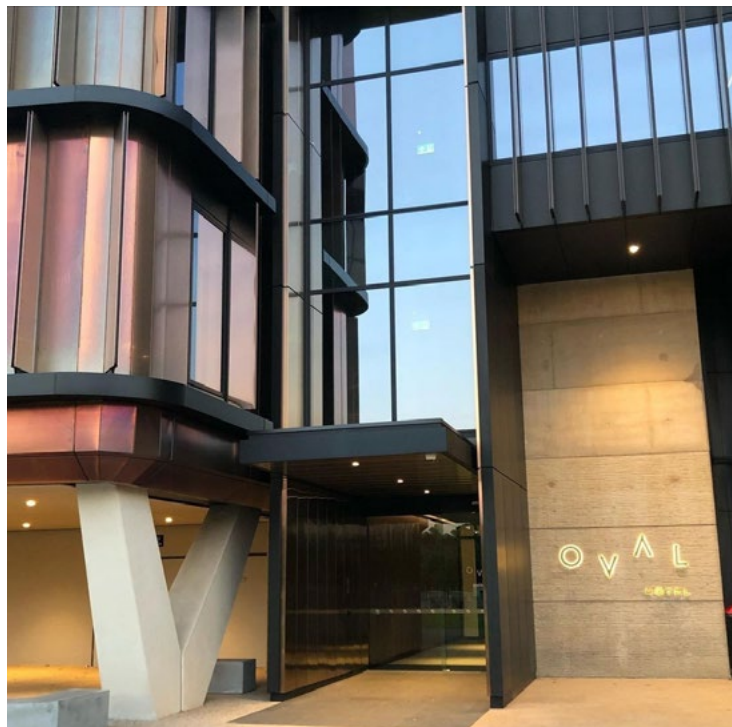
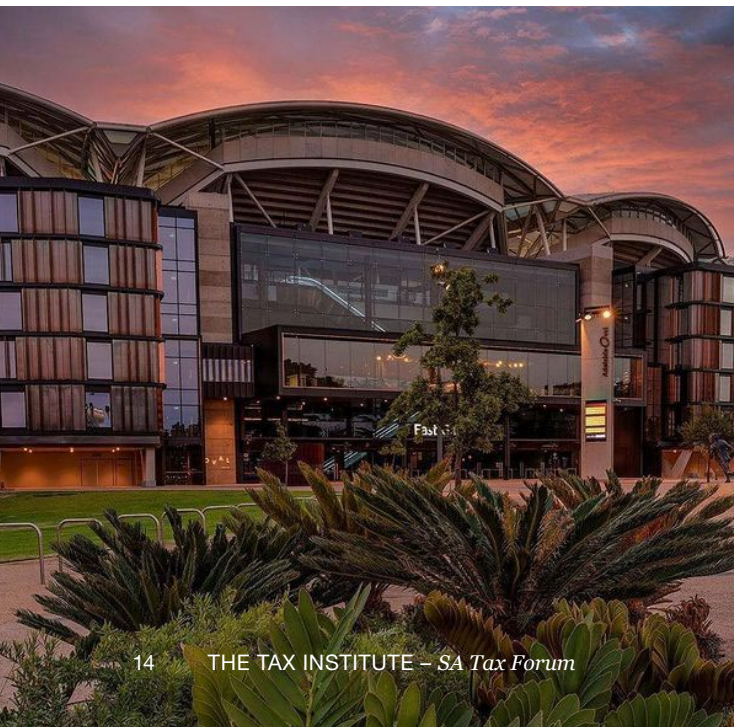
From the moment you take in your expansive view of Adelaide's historic parklands, you'll know you're in a place unlike any other.

Each of the 138 guest rooms offers contemporary design, enhanced by custom furnishing and in-room technology. Every part of your experience has been carefully considered, from your welcome drink on arrival through to thoughtful extras included in your stay.

We have secured favourable rates with the hotel. Delegates can access an exclusive 15% discount to experience Australia's first stadium hotel; wrapping gently around the

eastern facade of Adelaide Oval (this includes Complimentary Wi-Fi and a Beverage upon arrival).

Attendees can [click here](#) to take advantage of discounted delegate room rates – Simply select preferred date/s and the discount will be automatically applied. Please note terms & conditions apply regarding major event days.





# Event information

## Registration options and inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ Forum lunches	Welcome reception	How to register
<b>A Full forum face-to-face registration</b> This registration option entitles one delegate to attend the entire event.	✓	✓	✓	Register online or complete the form included in this brochure
<b>B Full forum online registration</b> This registration option entitles one delegate to attend the entire event online.	✓			Register online or complete the form included in this brochure

\*Additional tickets to the welcome reception can be purchased on the registration form.



**Register online at** [taxinstitute.com.au/sa-tax-forum](https://taxinstitute.com.au/sa-tax-forum)

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

### Early bird registration

All registrations received and paid on or before Friday, 25 February 2022 will be entitled to an early bird discount.

### Group Discounts

Purchase four full registrations (early bird or standard) and receive a fifth full registration for free. The free fifth registration must be of equal or of less value to the four paid registrations.

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 1300 829 338 or [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).

### Confirmation of registration

Please note you will receive two separate emails in the form of a confirmation email and tax invoice at the time of payment and registration completion.

### Continuing Professional Development

Attendance at the conference counts for 11 hours of Continuing Professional Development with The Tax Institute.

### The Tax Institute's Attendee Hub

As a hybrid event, both in person and online, this event will be accessible to all delegates via our dedicated Attendee Hub. Program information, materials (technical papers and

presentations), survey forms and more will be available via The Tax Institute's virtual Attendee Hub. All delegates are encouraged to access the platform prior to the event. Technical papers and PowerPoint presentations will be available on the Attendee Hub to all participating delegates approximately five days before the event. Delegates will receive instructions on accessing the virtual Attendee Hub by email.

### Delegate list

A delegate list will be included on the Attendee Hub to assist with networking. Please indicate at the time of registration if you do not want your name to be included. Alternatively, you can edit your profile visibility settings in the Virtual Attendee Hub at any time during the event.

### Dress code

Business or business casual attire is suitable for the duration of the conference.

### Networking function

A networking function will be held directly following the last session on Wednesday from 5.30pm at the Pavilion marquee at the Adelaide Oval. The networking function is included in the conference registration fee for delegates. Additional tickets are available to purchase for accompanying persons at a cost of \$75. Please indicate your requirements, including dietary requirements, when registering.

### Special dietary and accessibility requirements

Please indicate any special dietary requirements at the time of registration. Please email us with any accessibility requirements at [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au).



## Event information continued

### 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 in person 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 Organization and relevant State authorities. To see The Tax Institute's full COVID-19 Event Guidelines, [click here](#).

### Adelaide Oval Vaccination Policy

Please note that Adelaide Oval is a double COVID-19 vaccination only venue. Proof of double vaccination will be required for all game and event day patrons, all functions and events guests, all visitors to the stadium, all RoofClimb and Adelaide Oval Tours participants, as well as all suppliers and contractors.

People who are double vaccinated will be required to display their COVID-19 Digital Certificate via their smart phone prior to entry. Where this is not possible, a printed immunisation statement along with proof of identification will be accepted.

*Those with an official medical exemption will need to show their certificate of exemption and provide a recent negative test result no older than 72 hours.*

### Cancellation Policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should an in person 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 an in person 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.

### Privacy

We take your privacy seriously, and our policy can be viewed at: [www.taxinstitute.com.au/privacypolicy](http://www.taxinstitute.com.au/privacypolicy).

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**For further information regarding this event, please contact the Events Team on 1300 829 338 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

# SA Tax Forum Registration form

SA Tax Forum

42430 | WD

A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

## 1 Registration

Face to face registration | 42430

	Member	New member*	Non-member
<b>Early bird registration</b> Received on or before 25 February 2022	<input type="checkbox"/> \$1,400	<input type="checkbox"/> \$1,740	<input type="checkbox"/> \$1,700
<b>Standard registration</b> Received after 25 February 2022	<input type="checkbox"/> \$1,600	<input type="checkbox"/> \$1,940	<input type="checkbox"/> \$1,900

Online registration | 42431

	Member	New member*	Non-member
<b>Early bird registration</b> Received on or before 25 February 2022	<input type="checkbox"/> \$1,250	<input type="checkbox"/> \$1,590	<input type="checkbox"/> \$1,550
<b>Standard registration</b> Received after 25 February 2022	<input type="checkbox"/> \$1,450	<input type="checkbox"/> \$1,790	<input type="checkbox"/> \$1,750

☐ I acknowledge that I will receive electronic access to the available papers and presentations through The Tax Institute Attendee hub.

Dietary Requirements:

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 2023
- 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

Member no.:

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

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms

Date of birth:

DD/MM/YYYY

First name:

Last name:

Position:

Company:

Address:

Suburb:

State:

Postcode:

Telephone:

Mobile:

Email:

Dietary requirements:

☐ 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 Technical sessions options

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

### Wednesday, 23 March 2022

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

### Thursday, 24 March 2022

- 11:00am–12:00pm** ☐ Session 10A ☐ Session 10A  
**1:00–2:00pm** ☐ Session 11A ☐ Session 11A  
**2:30–3:30pm** ☐ Session 12A ☐ Session 12A

## 4 Welcome reception

The welcome reception on Wednesday, 23 March 2022 is included in the registration fee for delegates attending the full forum program. Day delegates and guests can book tickets at an additional cost below.

- ☐ Yes, **I WILL** be attending the welcome reception **OR**  
☐ No, **I WILL NOT** be attending the welcome reception

### Additional tickets

- ☐ Yes, I require additional tickets for the welcome reception at \$75 per person^

No.  x tickets at \$75 each: \$

Dietary requirements:

## 5 Payment summary

Forum registration

\$

Additional guest tickets – welcome reception (\$75 each)

\$

### Total payable

\$

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

## 6 Payment method

Please note: all registration payments must be made prior to the event, unless other arrangements have been made with The Tax Institute.

- ☐ **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](https://taxinstitute.com.au/professional-development/event-policy).

### Membership and education program promotion

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

### Marketing and business alliance partner exclusions

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

We take your privacy seriously, and our policy can be viewed at [taxinstitute.com.au/go/footer/privacy](https://taxinstitute.com.au/go/footer/privacy).

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](https://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](https://taxinstitute.com.au)

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

@ **Email**  
[customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au)

📠 **Fax**  
02 8223 0077



## THE TAX INSTITUTE

### Thank you

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

**Peter Slegers, CTA**, Cowell Clarke (Chair,  
SA Tax Forum Organising Committee)

**Annette Bonnett, ATI**, HLB Mann Judd

**Leo Efthivoulou, CTA**, ENA Law

**Tarun Kumar, CTA**, thnk Advisory

**Brad Simpson, CTA**, Commercial & Legal

**Rebecca Smith**, Bentleys SA/NT

**Ben Turner, FTI**, EY

**Nick Wilkins, CTA**, Wilkins Advisory

L37, 100 Miller Street  
North Sydney NSW 2060

Tel 1300 829 338

Fax 02 8223 0077

For information, please contact National events team  
at [nationalevents@taxinstitute.com.au](mailto:nationalevents@taxinstitute.com.au)

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