



THE TAX INSTITUTE



# 2019 Western Australia Tax Intensive

31 October – 1 November 2019 | Crown Perth

---

12 CPD hours



# Welcome

Now in its fifth year, the WA Tax Intensive provides a unique training opportunity for all WA tax advisers. With an interactive program dedicated to ensuring attendees leave with the practical knowledge they need to provide immediate value to their firm and clients, the intensive offers great variety and invaluable insights.

## Program highlights

- A mix of case study led workshops and technical masterclasses
- Topical subjects with an emphasis on “real-world” application
- Subject-matter experts from across Australia
- Flexible registration options including full registrations, single day registrations and employer tickets
- Bonus session aimed at developing tax professionals

## Thank you

The Tax Institute gratefully acknowledges the generous assistance of members of the 2019 WA Tax Intensive planning committee:

**Dudley Elliott, CTA**, Trove Group (Chair)

**Rupert Cheong, CTA**, Alpha Accounting Services

**Violet Lim, CTA**, Curtin University

**Tracey Scotchbrook, CTA**, Superology

**Modiesha Stephens, CTA**, MS Legal

**Rishi Wijay**, Wijay & Klimek Family Lawyers

## Speakers



**Robyn Jacobson, CTA**  
TaxBanter



**Peter Scott, FTI**  
Arnold Bloch Leibler



**Sean Neary, FTI**  
Neary Consulting



**Morgan Solomon**  
Solomon Hollett Lawyers



**Lee Nugawela**  
PwC



**Rishi Wijay**  
Klimek & Wijay Family Lawyers



**Jonathan Ortner, FTI**  
Arnold Bloch Leibler



**Ralph Xiang, FTI**  
Neary Consulting



**Dioni Perera, FTI**  
King & Wood Mallesons

---

## Early bird offer

*Register on or before Friday, 11 October 2019 to save!*

---

Proudly supported by:



# Technical program

Day 1 – Thursday, 31 October 2019

| Time          | Session  | Presenter   |
|---------------|--|---|
| 12.00–12.05pm | <b>Welcome</b>   |   |
| 12.05–1.35pm  | <p><b>Session 1A: CGT Concessions – Still great outcomes, but tighter eligibility</b></p> <p>Whilst micro businesses can still be sold largely CGT free, tighter eligibility rules mean many complex and/or multi-owner business are no longer eligible. Twenty years since the concessions were introduced, this session and the accompanying workshop examines the finer points in applying the concessions:</p> <ul style="list-style-type: none"> <li>– The object entity rules and how you can fail the \$6m net asset test with only \$2m</li> <li>– Are unpaid present entitlements to bucket companies liabilities that relate to the assets of a business?</li> <li>– Tips and traps for rolling the concessions through a multi-layered structure</li> <li>– The 80% active asset look through test – treatment of cash and Division 7A loans</li> <li>– What constitutes the “main use” of an asset for the active asset test?</li> <li>– What can constitute a “replacement asset”?</li> </ul> | <p><b>Sean Neary, FTI</b><br/>Neary Consulting</p>  |
| 1.35–2.00pm   | <b>Afternoon tea</b>   |   |
| 2.00–3.30pm   | <p><b>Session 1B: Workshop – CGT Concessions – Still great outcomes, but tighter eligibility</b></p> <p>This workshop will address “must do” matters and considerations as the CGT concessions are flowed through various entities including family discretionary trusts to individual beneficiaries and/or into superannuation.</p>   | <p><b>Sean Neary, FTI</b><br/>Neary Consulting</p> <p><b>Ralph Xiang, FTI</b><br/>Neary Consulting</p> <p><b>Workshop will be prepared by:</b><br/><b>Dudley Elliott, CTA</b><br/>Trove Group</p> |
| 3.30–3.35pm   | <b>Stretch break</b>   |   |
| 3.35–5.05pm   | <p><b>Session 2: Positioning SMEs and Individuals on Their Tax Audits and Disputes</b></p> <p>This is a practical session for practitioners who advise SMEs and high net worth individuals during tax reviews, audits and, ultimately, litigation. It will cover:</p> <ul style="list-style-type: none"> <li>– The best way to manage the matter and engage with the ATO having regard to risk and cost</li> <li>– How to respond to information requests, position papers, interest and penalties, while preserving the ability to resolve disputes</li> <li>– Tools available to taxpayers</li> <li>– How to manage the objections process and how to progress settlement and ADR processes with the ATO</li> <li>– The ins and outs of litigation and how to run it effectively</li> </ul> <p>The masterclass includes a case study of the matters that arise during an audit and the possible approaches to settlement.</p>  | <p><b>Dioni Perera, FTI</b><br/>King &amp; Wood Mallesons</p>   |
| 5.05–6.00pm   | <b>Sundowner Networking Reception</b>  |   |

“It’s the comprehensive workshops that distinguish the WA Tax Intensive from other events. I know I will leave the Intensive with not just the theory, but also a true understanding of how it applies in real world situations.”

Modiesha Stephens, CTA, MS Legal

# Technical program continued

Day 2 – Friday, 1 November 2019

| BONUS SESSION | Time        | Developing Tax Professionals Session  | Presenter                                       |
|---------------|-------------|---|---|
|               | 7.30–9.00am | <p><b>Property Ownership: Important Changes</b></p> <p>This session is aimed at developing tax professionals or those who would like a refresher on the topic. The session will be run as an interactive workshop where questions and discussion will be welcome.</p> <p>In the past few years, there have been a number of significant changes to the tax law which affect property transactions and ownership. This session will guide you through the new rules and focus on:</p> <ul style="list-style-type: none"> <li>– Changes to claiming depreciation on rental property assets and travel expenses</li> <li>– Implications of using Airbnb and increased ATO focus on rental properties</li> <li>– Foreign resident capital gains withholding rules</li> <li>– GST property withholding rules</li> <li>– Proposed new vacant land measures which deny deductions for holding costs</li> <li>– Proposed changes which deny the main residence exemption to foreign residents</li> <li>– Issues with individuals using properties owned by companies and trusts</li> <li>– ATO discretion to extend the two-year main residence exemption period where property passes to a deceased estate</li> </ul> <p><b>Coffee and a working breakfast will be provided.</b></p> | <p><b>Robyn Jacobson, CTA</b><br/>TaxBanter</p> |
|               | 9.00am      | <b>Bonus session close</b>  |   |

| Time          | Session  | Presenter   |
|---------------|--|---|
| 9.00–10.30am  | <p><b>Session 3: Practical International Tax Issues for SME and High-Net-Worth (HNW) Clients</b></p> <p>This session will cover a number of topical and practical international tax issues that can arise for resident and non-resident SME and HNW clients.</p> <p><b>Recent developments in tax residency</b></p> <ul style="list-style-type: none"> <li>– Individual residency, including the impact of the recent Harding decision</li> <li>– Corporate tax residency and the MLI</li> </ul> <p><b>Offshore issues for Australian residents</b></p> <ul style="list-style-type: none"> <li>– Getting money out of foreign discretionary trusts, covering section 99B, transferor trusts, the impact of TD 2017/23 and TD 2017/24, and lessons you can learn</li> <li>– A case study on restructuring into a foreign jurisdiction tax effectively and what to watch out for</li> </ul> <p><b>Inbound issues for non-residents</b></p> <ul style="list-style-type: none"> <li>– Distributions from Australian discretionary trusts to non-residents and the key issues that arise in practice</li> <li>– Setting up in Australia: branch v subsidiary</li> </ul> | <p><b>Jonathan Ortner, FTI</b><br/>Arnold Bloch Leibler</p> <p><b>Peter Scott, FTI</b><br/>Arnold Bloch Leibler</p> |
| 10.30–11.00am | <b>Morning tea</b>   |   |

“*The WA Tax Intensive is a ‘must attend’ event for me every year. The interactive workshops mean delegates can ask questions throughout, gaining a full understanding of complex topics. It is also a great opportunity to connect with other tax professionals.*”

Rupert Cheong, CTA, Alpha Accountancy Services Pty Ltd

*Day 2 – Friday, 1 November 2019* continued

| Time            | Session   | Presenter   |
|-----------------|---|---|
| 11.00am–12.30pm | <p><b>Session 4: Impact of the Corporate Tax Rates and Franking Changes on the Flow of Dividends for 2018–19, 2019–20 and beyond</b></p> <p>Having emerged from the two-year epic of the reduction of the corporate tax rate which produced multiple legislative amendments and ATO guidance, it is apparent that what was formerly a mundane process of determining a company's tax rate and franking rate is now more complicated. Do you understand all the intricacies in working out whether a company is a <i>base rate entity</i>?</p> <p>This session will cover the nuances, subtleties and anomalous outcomes of:</p> <ul style="list-style-type: none"> <li>– The reduced corporate tax rate</li> <li>– The meaning of 'base rate entity', 'base rate entity passive income' and 'corporate tax rate for imputation purposes', and associated interpretive issues</li> <li>– The relevance of TR 2019/1 when determining eligibility for the lower tax rate</li> <li>– The complex treatment of amounts flowing through chains of trusts and partnerships</li> <li>– Working out a company's franking rate, including dividend strategies</li> </ul> | <p><b>Robyn Jacobson, CTA</b><br/>TaxBanter</p>   |
| 12.30 – 1.15pm  | <b>Lunch</b>  |   |
| 1.15–2.45pm     | <p><b>Session 5A: Asset Protection: Three perspectives to enable holistic advice</b></p> <p>Increasingly, accountants are being asked to develop a comprehensive asset protection / wealth preservation strategy for high and ultra-high net wealth families. To do that, the accountant must have the knowledge and tools to advise on, or source advice on:</p> <ul style="list-style-type: none"> <li>– Taxation</li> <li>– Trusts</li> <li>– Business Structuring</li> <li>– Bankruptcy</li> <li>– Estate Planning</li> <li>– Family Law</li> <li>– Superannuation</li> </ul> <p>In this session you will learn about asset protection principles and strategies from an accountant, an estate lawyer and a family lawyer.</p>  | <p><b>Lee Nugawela</b><br/>PwC</p> <p><b>Morgan Solomon</b><br/>Solomon Hollett Lawyers</p> <p><b>Rishi Wijay</b><br/>Klimek &amp; Wijay Family Lawyers</p> |
| 2.45–3.15pm     | <b>Afternoon tea</b>  |   |
| 3.15–4.45pm     | <p><b>Session 5B: Workshop - Asset Protection: Three perspectives to enable holistic advice</b></p> <p>Along with session 5A, this workshop will provide delegates with an enhanced ability to develop holistic asset protection / wealth management strategies.</p>  | <p><b>Lee Nugawela</b><br/>PwC</p> <p><b>Morgan Solomon</b><br/>Solomon Hollett Lawyers</p> <p><b>Rishi Wijay</b><br/>Klimek &amp; Wijay Family Lawyers</p> |
| 4.45pm          | <b>Close</b>  |   |





# Presenter profiles

**Robyn Jacobson, CTA** a Senior Tax Trainer with TaxBanter Pty Ltd, is well known in tax training circles, having been a professional tax trainer for 22 years and a regular conference presenter. With nearly three decades in the profession, Robyn's public practice background preceded her training roles with Webb Martin and her own business, Cyntax, before its merger with TaxBanter in 2011. Robyn is a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. Based in Melbourne, she sits on The Tax Institute's Victorian Professional Development committee, is a member of the Victorian Tax Forum and Noosa Tax Intensive organising committees, and is the Chair of CPA Australia's Victorian Public Practice Committee. Robyn regularly consults with The Treasury, the ATO and the professional bodies on technical issues. Robyn is an avid advocate, social media commentator, blogger, host of TaxBanter's popular *Tax Yak* podcast and is regularly quoted in the media. She was recently recognised in the Women In Finance Awards 2019 as the Winner of *Thought Leader of the Year*.

**Sean Neary, FTI** is founder of Neary Consulting, a boutique tax practice in West Perth. Sean focuses on addressing complex tax issues for small and medium enterprises, including referral work from other accounting practices. His practice covers ATO and OSR dispute resolution, business sales and restructures, small business CGT concessions, business sales and restructures, international tax, GST and Transfer Duty. Sean has a Bachelor of Economics, Masters of Tax Law and is both a CPA and Fellow of the Tax Institute. His work history includes roles in Deloitte, PwC, Dow Corning, PKF, Webb Martin and was founding Chairman of technology materials group Talga Resources Limited (ASX: TLG).

**Lee Nugawela** is a director in PwC's Private Client Practice and has over 11 years of experience providing accounting, taxation, business improvement services and business advice to a large portfolio of diverse clients. Lee works with many large family groups, providing structuring advice, asset protection and wealth creation strategies. Lee is able to leverage this experience to provide his clients with a holistic offering, advising them on a range of technical and commercial issues at both a business and personal level. Lee also runs the NextGen program at PwC Perth, a series

of topical briefings aimed at providing insights into succession and the next generation.

**Jonathan Ortner, FTI** is a partner in Arnold Bloch Leibler's Sydney taxation group and practices in all areas of direct and indirect tax with a particular focus on the taxation of trusts and corporate income tax and mergers and acquisitions. Jonathan has also advised extensively on cross-border taxation issues; employment taxes, including the tax treatment of employee share schemes, termination payments and fringe benefits; and the GST implications of transactions and dealings in the development of property. Using his technical tax knowledge, Jonathan works with clients to obtain commercial and practical outcomes. He has particular experience in dealing with the Australian Taxation Office on complex tax issues in a dispute resolution context. Jonathan is a keen and active member of the tax community. As well as presenting on tax topics at various sessions and authoring a number of published articles, papers and bulletins, Jonathan is an active member of the Tax Institute's GST and SME committees. Prior to joining Arnold Bloch Leibler in 2012, Jonathan worked in a financial advisory role at a top investment bank and a Big Four accounting firm.

**Dioni Perera, FTI** specialises in tax advisory and tax disputes at King & Wood Mallesons. She acts for a wide range of clients across a range of tax issues, most recently including Division 7A, Part IVA, transfer pricing and R&D. She has significant experience in negotiating with the ATO, other regulators and various stakeholders, and has advised a number of clients in settling their disputes with the Commissioner. She has run a number of cases at first instance and on appeal and advised clients on the Part IVC process and related debt recovery proceedings, legal professional privilege, FOI issues and the gathering of evidence for litigation.

**Peter Scott, FTI** is a Senior Associate in Arnold Bloch Leibler's taxation group. He provides strategic and technical tax advice to a diverse range of Australian and international clients, public corporations, private groups, and high-net-worth individuals. Peter advises across most areas of tax with a particular focus on corporate and international tax, deals, employee share schemes, trusts and tax controversy matters. Peter is a member of the Tax Institute NSW Emerging Leaders Subcommittee and was a 2019 Tax

Institute Awards finalist in the Emerging Tax Star category.

**Morgan Solomon** is founding Director at Perth law firm Solomon Hollett Lawyers, a nationally recognised and awarded lawyer who specialises in all forms of succession law. As one of the state's leading legal practitioners in his field Morgan was recognised by Doyles Guide in 2018 as a pre-eminent Wills and Estates Succession Planning lawyer and as a leading Wills and Estates Litigation lawyer. He regularly speaks to industry and media about complex issues within the law, legal trends and the impact on Australians and Australian business. In recent years Morgan has held the positions of both Vice Chair and then Chair of the Law Australasia group of leading independent law firms. A third-generation West Australian lawyer, Morgan also takes an active role in the State's cultural community having obtained an honours degree in fine art before his studies in law. Morgan is also a Founding Member of the WA Chamber of Culture and the Arts, sits on the Board of the Prostate Cancer Foundation and is the Chair of the Perth Theatre Trust.

**Rishi Wijay** is the Managing Director of Klimek & Wijay Family Lawyers, a boutique firm specialising in family law. He is an admitted practitioner of the Supreme Court of Western Australia and the High Court of Australia, and has been practicing exclusively in Family Law for the last 14 years. Alongside his legal qualifications, Rishi has considerable commercial experience and qualifications. Rishi is a member of the Tax Institute of Western Australia, and regularly presents for the Institute on topics at the intersection of family law, taxation, accounting and estate planning. He has also guest lectured at the University of Western Australia, and given presentations to other related professionals. In 2019 he was recognised for the second year running by Doyle's Guide as a Leading Family Lawyer in Western Australia. He was also recognised in the short list of leading Western Australian Family Lawyers for High-Value & Complex Property Matters.

**Ralph Xiang, FTI** is a Senior Consultant with Neary Consulting. He provides tax advisory and compliance services across a wide spectrum of business clients, including multinationals, property, mining and mining services industries. He has worked on many business restructures, small business CGT concessions and international tax planning projects.



# Event information

## Registration options and inclusions

|  | Online access to technical papers prior to the event through The Tax Institute CPD app | Morning tea/ lunches/ afternoon tea | Sundowner networking reception on Thursday evening | How to register  |
|--|--|-------------------------------------|--|--|
| <b>A Full registration</b><br>This registration option entitles one delegate to attend the entire event. Includes bonus session.                                 | ✓  | ✓                                   | ✓  | Register online or complete the form included in this brochure.                                  |
| <b>B Day registration</b><br>This registration option entitles one delegate to attend a full day of technical sessions.  | ✓  | ✓<br>for your selected day          |  | Please complete the form included in this brochure and send to customeradmin@taxinstitute.com.au |
| <b>C Employer ticket</b><br>This registration option allows one registration to be shared between multiple attendees from the same firm. Includes bonus session. | ✓  |                                     |  | Please complete the form included in this brochure and send to customeradmin@taxinstitute.com.au |

\*Additional tickets to the Sundowner networking reception on Thursday, 31 October and networking lunch on Friday, 1 November can be purchased on the registration form

**Please note:** The registration fee does not include accommodation, hotel incidentals, transfers or delegate folders (refer "Paper materials").



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

## Discounts

### Early bird registration

All full intensive registrations received and paid on or before Friday, 11 October 2019 will be entitled to an early bird discount.

### Group discounts

A \$70 discount applies when 2 attendees from the same firm register for the full event (early bird and standard) at the same time.

Purchase 3 or more full registrations (early bird or standard) and receive 20% discount. This offer cannot be redeemed in conjunction with any other offer, promotional code or discount. All attendees must be from the same firm and all registration forms must be submitted together.

### Delegate List

To assist with networking, a delegate list will be included electronically on the event app. Please indicate on the registration form if you do not want your name included on the list.

### Confirmation of registration

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

### CPD accreditation

Attendance at the full convention counts for 12 hours of Professional Development Accreditation with The Tax Institute.

Single-day attendance on Thursday counts for 4.5 hours and on Friday counts for 7.5 hours. Employer ticket attendance will be allocated accordingly to each attendee. This event is accredited with the Legal Practice Board of Western Australia for CPD points.

### Paper materials

Materials will be provided in electronic format through The Tax Institute CPD app. Paper materials will not be provided.

### The Tax Institute CPD app

The Tax Institute CPD app will be accessible for delegates to download available technical materials in the days prior to event commencement. The app will contain session and speaker information, the delegate list and available technical materials. Delegates will receive instructions via email detailing how to download and access materials.

### Employer tickets

This registration option allows one registration to be shared between multiple attendees (maximum 6) from the same firm. All attendees will receive electronic access to The Tax Institute CPD app which contains all available presentations and papers. Morning and afternoon tea breaks, lunch and Sundowner Networking Reception are not included in this price. Lunch on both days may be purchased separately at a cost of \$50 per person. To register for the employer ticket, please complete the employer ticket registration form on the final page of this brochure.

## Event information continued

### Special dietary requirements

Please indicate any special dietary requirements on the registration form.

### Sundowner Networking Reception

Delegates are invited to network over drinks and canapes at the close of the technical program on Thursday evening. This is a fantastic opportunity to wind down after day one of the intensive workshops and network with fellow delegates.

### Dress code

Business casual attire is suitable for the duration of the intensive, including Thursday evening's drinks reception.

### Wi-Fi

Internet access will be available for Intensive delegates using a dedicated access code, provided to delegates at registration. Complimentary Wi-Fi is accessible throughout the Crown Perth.

### Alteration and cancellation policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. It is a condition of acceptance of registration that an administration fee of 20% of the registration fee will be charged for cancellation. No refund will be given for cancellations received within five working days of the convention. 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.

---

For further information regarding this event, please contact the WA Team on 08 6165 6600 or email [wa@taxinstitute.com.au](mailto:wa@taxinstitute.com.au)

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

---

## Join the conversation



[facebook.com/thetaxinstitute](https://facebook.com/thetaxinstitute)



[twitter.com/taxinstituteoz](https://twitter.com/taxinstituteoz)



[linkedin.com/company/the-tax-institute](https://linkedin.com/company/the-tax-institute)



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

## Venue

### Crown Perth

Great Eastern Highway  
Burswood, Western Australia



Crown Perth is a full integrated entertainment precinct renowned for its world-class facilities and luxury accommodation.

Situated on the eastern banks of the Swan River, it is only minutes from the Perth CBD and both domestic and international airports. Crown Perth is home to many premium restaurants, including Rockpool Bar & Grill, Nobu, Bistro Guillame, Silks and Modo Mio.

### Parking

Parking is free at Crown Perth in selected car bays. More information is available at [www.crownperth.com.au/general/parking/information](http://www.crownperth.com.au/general/parking/information)

### Public Transport

Crown Perth easily accessible via public transport, just a short walk from Burswood train station and many bus stations. For all bus, train or ferry information, or to plan your journey, please contact Transperth on 13 62 13 or visit their [website](http://www.transperth.com.au).

### Accommodation

Accommodation is available at Crown Perth at Crown Towers, Crown Metropolis and Crown Promenade. To view room rates or book your accommodation, please go to [www.crownperth.com.au/hotels](http://www.crownperth.com.au/hotels)





THE TAX INSTITUTE

# 2019 WA Tax Intensive Registration form

2019 Western Australia Tax Intensive | 31 October – 1 November | Crown Perth

40326 | WD

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

## 1 Registration

### A Full conference registration – includes bonus Developing Tax Professionals session

See page 7 for registration inclusions.

|   | Member                           | New member                       | Non-member                       |
|---|----------------------------------|----------------------------------|----------------------------------|
| <b>Early bird registration</b><br>Received on or before 11 October 2019 | <input type="checkbox"/> \$1,040 | <input type="checkbox"/> \$1,380 | <input type="checkbox"/> \$1,210 |
| <b>Group discount 1 (2 attendees)</b>                                   | <input type="checkbox"/> \$970   | <input type="checkbox"/> \$1,310 | <input type="checkbox"/> \$1,140 |
| <b>Group discount 2 (3+ attendees)</b>                                  | <input type="checkbox"/> \$832   | <input type="checkbox"/> \$1,172 | <input type="checkbox"/> \$968   |
| <b>Standard registration</b><br>Received on or after 11 October 2019    | <input type="checkbox"/> \$1,140 | <input type="checkbox"/> \$1,480 | <input type="checkbox"/> \$1,310 |
| <b>Group discount 1 (2 attendees)</b>                                   | <input type="checkbox"/> \$1,070 | <input type="checkbox"/> \$1,410 | <input type="checkbox"/> \$1,240 |
| <b>Group discount 2 (3+ attendees)</b>                                  | <input type="checkbox"/> \$912   | <input type="checkbox"/> \$1,252 | <input type="checkbox"/> \$1,048 |

For group discounts, all attendees must be from the same firm and all registrations must be submitted together. This offer cannot be redeemed in conjunction with any other offer, promotional code or discount.

#### Bonus Developing Tax Professionals Session\* (included in registration)

- Yes, I will attend the bonus session  
 No, I will not attend the bonus session

I will send somebody in my place (please include name and member number)

\* Additional tickets for the bonus session are available. Please contact the WA office on wa@taxinstitute.com.au or 08 6165 6602.

### B Day registration^

|   | Member                         | New member                       | Non-member                     |
|---|--------------------------------|----------------------------------|--------------------------------|
| <b>Thursday only – does not include bonus session</b>     | <input type="checkbox"/> \$465 | <input type="checkbox"/> \$805   | <input type="checkbox"/> \$565 |
| <b>Friday only – bonus session included (refer above)</b> | <input type="checkbox"/> \$710 | <input type="checkbox"/> \$1,050 | <input type="checkbox"/> \$810 |

^ Day registration does not include tickets to the Sundowner Networking Reception. Tickets can be purchased on section 3 of this form.

## 2 Delegate contact details

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

Title:  Mr  Mrs  Miss  Ms  Other (please specify)  Date of birth:

First name:  Last name:

Position:  Company:

Address:

Suburb:  State:  Postcode:

Telephone:  Fax:

Mobile:  Email:

Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking purposes.

#### \*EVENT AND MEMBERSHIP OFFER

There is no better time than right now for non-members to take up membership! Register at the Member rate + add on \$340 for Membership and receive member benefits through to 30 June 2020. All new members are eligible to 'upgrade' their membership level at no additional cost by providing the appropriate documentation when applying within the initial membership subscription period. 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. Further information available at [taxinstitute.com.au](http://taxinstitute.com.au)

Signature:

Date of signature:

Promotional code:

#### Delegate materials

I understand that the registration fees do not include printed materials. Access to materials will be electronic via The Tax Institute CPD app.

#### C Employer Ticket

Please see employer ticket registration form included in the brochure.

### 3 Sundowner networking reception

The Sundowner networking reception is **INCLUDED** in the registration fee for delegates attending the full convention program.

Thursday, 31 October 2019

- Yes, **I WILL** be attending the Sundowner networking reception **OR**  
 No, **I WILL NOT** be attending the Sundowner networking reception

#### Additional tickets<sup>^</sup>

- Yes I require additional tickets for the Sundowner networking drinks at \$50 per person

No.  x tickets at \$50 each: \$

<sup>^</sup>Please supply names of attendees and any dietary requirements as a separate attachment.

### 4 Payment summary

Registration fee

\$

Additional Sundowner networking reception (\$50 each)

\$

**Total payable**

\$

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

### 5 Payment method

**Cheque payable to The Tax Institute** (in Australian dollars)

**Credit card** Card type:  AMEX  Visa  MasterCard  Diners

Name on card:

Card no.:  Expiry date:  Cardholder's signature:

For our refund, cancellation and replacement policy visit [taxinstitute.com.au/professional-development/event-policy](http://taxinstitute.com.au/professional-development/event-policy).

#### 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](http://taxinstitute.com.au/go/footer/privacy).

### Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. TTI collects, uses, holds and discloses your personal information (including sensitive information, such as health information) for a range of purposes, such as administrative purposes relating to membership of TTI and TTI's courses (including assessment of eligibility and providing courses), compliance with Government and statutory requirements, provision of information relating to TTI's services and member benefits and to conduct market research. If you do not provide the personal information requested by TTI, it may not be able to provide its services to you, such as assessment of your course enrolment application. TTI does not disclose criminal record information to third parties. TTI usually discloses your personal information to entities such as your sponsoring employer (with respect to your course records and results), The Tax Practitioners Board, TTI's business partners for marketing purposes, IT companies and other companies who provide administrative and other services to TTI and government bodies, such as the Tertiary Education and Quality Standards Agency. TTI may disclose personal information to overseas recipients in countries such as the United States of America and India. For further information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at [www.taxinstitute.com.au](http://www.taxinstitute.com.au). The Privacy Policy also contains information on how to request access to or correction of your personal information and how to make a complaint about a breach of privacy. 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 as set out in this notice and in accordance with TTI's Privacy Policy. If you do not want your personal information to be used by TTI or disclosed to third parties, for the purpose of direct marketing, please contact us in writing at [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au).

#### TO REGISTER

🔗 **Online** [taxinstitute.com.au/waint19](http://taxinstitute.com.au/waint19)

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

✉ **Mail** GPO Box 1694 Sydney, NSW 2001

☎ **Fax** 02 8223 0077



THE TAX INSTITUTE

# 2019 WA Tax Intensive Employer ticket registration form

2019 Western Australia Tax Intensive | 31 October – 1 November | Crown Perth

40326 | 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.

## Employer ticket registration

### Employer ticket registration

- Multi-user registration (register up to 6 delegates from the same organisation)
- Attendance at any session of your choice (total 5 technical sessions and 1 bonus session)
- Electronic access to download available technical papers and presentations
- Up to 12 CPD hours

### Session selection

Please complete the form overleaf indicating the sessions that each person is attending. Please note that sessions will be allocated on a first-come, first-served basis, so please make your selections as soon as possible to avoid disappointment. Please ensure the form is correct as CPD hours will be allocated accordingly.

Please note: Employer tickets do not include attendance at the networking lunches. Access to materials will be electronic.

### Once you have registered

You will receive a tax invoice and confirmation letter including details of your session selections.

Please check your session details and contact The Tax Institute on 08 6165 6600 if any details are incorrect.

## 1 Registration options

Standard registration

\$1,365

### Delegate materials

I understand that the registration fees do not include printed materials. Access to materials will be electronic via The Tax Institute CPD app.

### Sundowner networking reception – Thursday, 31 October 2019

I would like to purchase tickets to Sundowner networking reception^

No.  x tickets at \$50 each:

\$

### Networking lunch – Friday, 1 November 2019

I would like to purchase tickets to networking lunch^

No.  x tickets at \$50 each:

\$

**Total payable**

\$

Dietary requirements:

^Please supply names of attendees and any dietary requirements in the space above or as a separate attachment

## 2 Delegate contact details

Member no.:

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

Title:

Mr  Mrs  Miss  Ms  Other (please specify)

Date of birth:

First name:

Last name:

Position:

Company:

Address:

Suburb:

State:

Postcode:

Telephone:

Fax:

Mobile:

Email:

Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking purposes.

### 3 Session selection

Please note sessions are subject to availability.

|  | Session number<br>(1st choice)             | Attendees' preferred full name<br>(for name badge) | Tax Institute member/<br>non-member number (if known) | Attendee's email address<br>(required) |
|--|--|--|---|--|
|  | 1A &<br>1B                                 |  |   |  |
|  | 2  |  |   |  |
|  | 3  |  |   |  |
|  | 4  |  |   |  |
|  | 5A &<br>5B                                 |  |   |  |
|  | <b>Bonus session</b><br>(Friday at 7.30am) |  |   |  |

### 4 Payment method

Cheque payable to The Tax Institute (in Australian dollars)

Credit card Card type:  AMEX  Visa  MasterCard  Diners

Name on card:

Card no.:  Expiry date:  Cardholder's signature:

For our refund, cancellation and replacement policy visit [taxinstitute.com.au/professional-development/event-policy](http://taxinstitute.com.au/professional-development/event-policy).

#### 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](http://taxinstitute.com.au/go/footer/privacy).

### Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. TTI collects, uses, holds and discloses your personal information (including sensitive information, such as health information) for a range of purposes, such as administrative purposes relating to membership of TTI and TTI's courses (including assessment of eligibility and providing courses), compliance with Government and statutory requirements, provision of information relating to TTI's services and member benefits and to conduct market research. If you do not provide the personal information requested by TTI, it may not be able to provide its services to you, such as assessment of your course enrolment application. TTI does not disclose criminal record information to third parties. TTI usually discloses your personal information to entities such as your sponsoring employer (with respect to your course records and results), The Tax Practitioners Board, TTI's business partners for marketing purposes, IT companies and other companies who provide administrative and other services to TTI and government bodies, such as the Tertiary Education and Quality Standards Agency. TTI may disclose personal information to overseas recipients in countries such as the United States of America and India. For further information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at [www.taxinstitute.com.au](http://www.taxinstitute.com.au). The Privacy Policy also contains information on how to request access to or correction of your personal information and how to make a complaint about a breach of privacy. 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 as set out in this notice and in accordance with TTI's Privacy Policy. If you do not want your personal information to be used by TTI or disclosed to third parties, for the purpose of direct marketing, please contact us in writing at [customeradmin@taxinstitute.com.au](mailto:customeradmin@taxinstitute.com.au).

#### TO REGISTER

🔗 Online [taxinstitute.com.au/waint19](http://taxinstitute.com.au/waint19)

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

✉ Mail GPO Box 1694 Sydney, NSW 2001

☎ Fax 02 8223 0077