

Private Business Tax Retreat

16–17 February 2023

JW Marriott Gold Coast Resort & Spa

13 CPD hours



Welcome

The premier forum for SME experts and expertise

The Private Business Tax Retreat has been designed for SME advisors who are, and who aspire to be, at the top of their game. In keeping with its long tradition of technical excellence and deep dive culture, this event continues to attract the best speakers from the national pool of top SME tax professionals.

The 2023 program has been designed to leave delegates with knowledge and awareness of all the key issues that concern their SME clients, and abreast of breaking developments in tax that need comprehensive answers. With two days of focused learning on all the latest issues that affect SME advisor's client base, it's simply a 'can't miss' event.

Connect with like-minded professionals

The Tax Institute prides itself on providing unmatched networking experiences for the Australian tax community. The Private Business Tax Retreat is no different and offers ample networking opportunities. Year on year, the event brings together professionals with similar interests and aspirations.

A retreat in the true sense of the word

As busy professionals, we all need quality time to reflect on our business and our clients. What do our clients need from us now? Is our focus right? Where do we want to be when we come back to PBTR in 2024? The Private Business Tax Retreat offers not only a fantastic program, but the opportunity for delegates to detach from the daily grind and allow time for creativity.

The Private Business Tax Retreat is a feast for the mind at both a professional and recreational level, a world away from the distractions of the office. The event is designed to give you the space you need to absorb contemporary tax thinking, and new directions in your career and practice.



Dominic Moon, ATI
Chair, Conference Organising Committee

Early bird pricing offer
Register on or before Friday, 20 January 2023 to save!

Technical Program

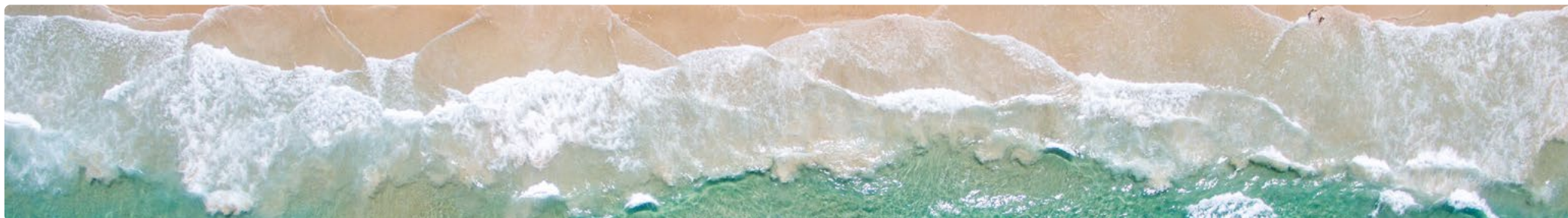
Day 1 Thursday, 16 February 2023

Time	Session
8:00 – 8:25am	Registration
8:25 – 8:30am	Welcome and opening address
8:30 – 9:30am	<p>Session 1: Keynote address: Issues & opportunities for SMEs Speaker: The Hon. Bruce Billson, Australian Small Business and Family Enterprise Ombudsman</p> <p>Operating a small or family business has many challenges in today's current environment. In this session, our VIP speaker will discuss the current issues and opportunities for small businesses.</p>
9:30 – 10:30am	<p>Session 2: Impact of General Purpose Simplified Disclosure Standards Speaker: Kamal Thakkar, Kreston Stanley Williamson</p> <p>We know that for the 30 June 2022 year and beyond, certain entities will no longer be able to prepare Special Purpose financial statements. This session is designed to give you the practical answers needed for you and your clients, and will cover:</p> <ul style="list-style-type: none">• The main practical differences between Special Purpose and General Purpose financial statements• Transitioning from SPFS to GPFS – what is required?• Awareness of the transitional provisions• Where we are left with the safe harbour provisions available for start ups under the employee share scheme (ESS) legislation?• Reviewing trust deeds and Constitutions – can amendments be made and if so what are the suggestions?• Tier 1 and Tier 2 entities and simplified disclosures – awareness of the differences and the differing requirements.• For SMEs – what about disclosures for audit fees, franking credits and reconciliation of income tax expense?• Restated comparatives – when is this required?
10:30 – 11:00am	Morning tea
11:00am – 12:00pm	<p>Session 3: Asset protection post Permewan Speakers: Caite Brewer, Hemmant's List, Dr Pip Coore, Hemmant's List</p> <p>Gift and loan back arrangements are a popular strategy for a number of reasons, including for estate planning and asset protection. The case of <i>Re Permewan (No 2)</i> [2022] QSC 114 brings into question whether gift and loan back strategies can be effective. This session considers:</p> <ul style="list-style-type: none">• What did the Court say in <i>Re Permewan</i>?• Why was the gift and loan back scheme unsuccessful in that case?• What does <i>Re Permewan</i> mean for earlier gift and loan cases such as <i>Atia v Nusbaum</i> [2011] QSC 44?• What is the impact on gift and loan back transactions moving forward?

Technical Program

Day 1 Thursday, 16 February 2023 continued

Time	Session
12:00–1:00pm	<p>Session 4: Digital assets and your client’s business Speaker: Tracey Dunn, EY</p> <p>From cryptocurrency to NFT’s, digital assets are flooding onto the market at an exponential rate. In 2022 the Board of Taxation conducted a review into the tax treatment of digital assets and transactions in Australia, highlighting the question, are our tax laws up to speed? This session will cover:</p> <ul style="list-style-type: none">• How are your clients – both individuals and businesses – using crypto now? (25% of them are!)• The basics of taxation When things get complicated, with real world examples, and• Agent obligations and reliance on third party reports
1:00–2:00pm	Lunch
2:00–3:00pm	<p>Session 5: Keynote address: Economic trends 2022–2023 Speaker: Martin Lakos, Macquarie</p> <p>In this session, Martin will provide an economic update on the domestic and international economic environment. He will cover what businesses can expect from the rest of the current financial year and coming years, from current trends, to interest rates and investment and business strategy.</p>
3:00–3:30pm	Afternoon tea
3:30–4:30pm	<p>Session 6: 100Yay or Nay Speakers: Liz Allen, Macpherson Kelley, John Ioannou, CTA, Macpherson Kelley</p> <p>Join John and Liz for a decidedly unlaywerly rendition of the history of 100A and associated cases ... without needing to read them for yourself.</p> <p>This session will help you make the decisions in practice to answer the question on everyone’s lips: is it 100A – yay or nay?</p>



Technical Program

Day 1 Thursday, 16 February 2023 continued

Time	Session
4:30 – 5:30pm	<p>Session 7.1: State taxes update Speaker: Tom Walrut, FTI, Cooper Grace Ward Lawyers</p> <p>This session will provide an overview of recent changes in state taxes and a reminder on some of the key provisions for foreign residents including:</p> <ul style="list-style-type: none">• Victorian Windfall Gains Tax• Queensland duty exemption for small business restructures• NSW change in beneficial ownership of dutiable property and• Duty and land tax surcharges for foreign persons <p>Session 7.2: Tax Policy and Advocacy update Speaker: Scott Treatt, CTA, The Tax Institute</p> <p>A discussion on the key issues presently impacting the profession and the work The Tax Institute is undertaking in this regard. The session will also include an update on the activities of our technical committees and our current engagement with government and other key stakeholders.</p>
5:30 – 6:30pm	Delegate free time
6:30pm	Retreat Dinner



Retreat Dinner

Join your colleagues, peers and our esteemed presenters for an evening of fine dining and networking.

The official retreat dinner will be held poolside at the JW Marriott Gold Coast Resort & Spa. Grab your sandals and beach dress or board shorts and enjoy some of what the Gold Coast has to offer.

Date: Thursday, 16 February 2022

Time: 6:30–10:00pm

Venue: JW Marriott Gold Coast Resort & Spa

Price: Inclusive for all full registration delegates
Additional tickets are \$150 per person, see registration form for details

Dress: Poolside business casual

Technical Program

Day 2 Friday, 17 February 2023

Time	Session
9:00 – 10:00am	<p>Session 8: Payroll taxes Speaker: Jodie Robinson, CTA, McCullough Robertson</p> <p>Healthcare practices have been in the spotlight lately following recent decisions in New South Wales and Victoria. Revenue Offices are commencing audits focusing on the characterisation of payments made by medical practices to doctors who practice at the clinic for payroll tax purposes. In this session we will:</p> <ul style="list-style-type: none">• Explore the case decisions in <i>Thomas and Naaz Pty Ltd v Chief Commissioner of State Revenue</i> [2021] NSWCATAD 259 and <i>Commissioner of State Revenue v The Optical Superstore Pty Ltd as Trustee for OS Management S Trust and Ors</i> [2019] VSCA 197, and the recent Victoria revenue ruling affecting payments received by medical practitioners from medical centres• Consider the practical implications of these decisions, including their application to other industries and the approach of the revenue offices and• Discuss what your clients should be doing now, in relation to their arrangements.
10:00 – 11:00am	<p>Session 9: David v Goliath: Dealing with ATO Debt and Recovery Action Speakers: Shaun Cartoon, FTI, Arnold Bloch Leibler, Andrew Spierings, ATI, Arnold Bloch Leibler</p> <p>The ATO debt book has now hit \$61 billion as concessions provided during the height of the COVID-19 pandemic are removed. The Commissioner’s recovery powers are extensive, and many businesses are facing the prospect of aggressive recovery action.</p> <p>This session will provide practical strategies for dealing with the ATO and highlight what options may be available to assist businesses in managing their ATO debt including:</p> <ul style="list-style-type: none">• Approaches to engaging• Managing debt during a dispute• Director penalty notices• Departure prohibition orders and• Small business restructuring options.
11:00 – 11:30am	Morning tea
11:30am – 12:30pm	<p>Session 10: Start ups and raising money – from the perspective of the investor and from the start up entity Speaker: Michael Anderson, BDO</p> <p>There are a large number of tax concessions available, not only to support new businesses but also to encourage investors and new capital. There are also extra costs along the way to attract investors, and consequences of changes in ownership. This session will cover some particular tax issues arising, both from the perspective of the investor and the start- up entity, as follows:</p> <ul style="list-style-type: none">• Franked distributions and capital raising- the impact of the proposed legislation• The growth of pe funds – delving into the tax concessions and traps of investing via ESVCLPs and VCLPs• New capital injected and the failure of COT and the impact on losses• Some alternative funding arrangements – convertible notes and interests, converting debt to equity and the tax issues• The costs of capital raising, what is deductible, what is 40-880 and what is black hole?• The ESS start up concessions, what are the traps; ESICs – to rule or not to rule, and who can rely on it anyway?

Technical Program

Day 2 Friday, 17 February 2023 continued

Time	Session
12:30–1:30pm	<p>Session 11: ANZAC Rivalries: efficient use of tax paid in trans-Tasman dealings Speakers: Mark Reynolds, CTA, Crowe, Ryan Watt, Crowe</p> <p>Trans-Tasman business dealings are common. However, whether a credit or offset is available for tax paid in the other jurisdiction can, if wrong decisions are made, result in a tax outcome more unpleasant than the morning after a Bledisloe Cup defeat.</p> <p>This session will examine:</p> <ul style="list-style-type: none">• For Australian taxpayers doing business in New Zealand:<ul style="list-style-type: none">- NZ income-taxes applying to general business income- When to declare such income in Australia- How to claim FITO/exemption on these NZ taxes paid, in Australia- Different outcomes, based upon the type of structure used including Trans-Tasman imputation, and• For New Zealand taxpayers doing business in Australia, addressing the same concerns. That is, how to effectively use Australian taxes paid, as a credit in New Zealand.
1:30–2:30pm	Lunch
2:30–3:30pm	<p>Session 12: The importance of turnover and unravelling the complexity Speaker: Jacquii Reeves, CTA, BusinessDEPOT</p> <p>An entity's turnover is important for a huge number of reasons, including the tax rate, various small and medium business tax concessions, amendment periods, and the reporting requirements. This session aims to delve into what is in and what is out of turnover and what you need to be aware of, including:</p> <ul style="list-style-type: none">• Key tax provisions and concessions that rely on an aggregated turnover calculation• Meaning of Small Business Entity [Section 328-110] versus Aggregated Turnover [Section 328-115]• Key concepts including, connected entity, affiliate, annual turnover and carrying on a business and• Specific exclusions from annual turnover including common examples experienced in practice.
3:30–4:30pm	<p>Session 13: Traffic lights: Section 100A and professional firms and everything in between Panelists: David Hughes, CTA, McCullough Robertson, Mark Molesworth, CTA, BDO, Helen Symon KC, Victorian Bar Facilitator: Kaitilin Lowdon, ATI, Arnold Bloch Leibler</p> <p>In recent years, the ATO has introduced a traffic lights system into its practical compliance guidelines. If you fall in the green zone, your arrangement is deemed low risk. If you fall in the red zone, your arrangement is deemed high risk. And then, depending on the guidance, you may fall into a zone of blue, yellow or amber. Not to mention the white zone.</p> <p>The zones do not mean that (say) section 100A or Part IVA apply, or do not apply, but indicate the likelihood of the ATO looking at the arrangement. The challenge, what happens if you fall outside a zone?</p> <p>With a particular focus on the guidance on s 100A and professional firms, this panel will discuss whether traffic management is an effective tool in tax compliance, what to do when you fall between the cracks of a practical compliance guideline, and what to do when the ATO starts asking questions and you are in the middle of the intersection.</p>
4:30pm	Closing address and networking drinks

Presenters

Liz Allen is a Special Counsel at Macpherson Kelly. She acts for a wide range of private, corporate and HNWI clients with a primary focus on tax structuring and tax dispute work, concentrating on the delivery of outcomes and solutions that give her clients the confidence to keep doing what they do best. Elizabeth also acts for clients on various commercial matters including business sales and acquisitions.

Michael Anderson is a Partner in the corporate and international tax team in the Sydney office. A nuanced and effective communicator, Michael brings a wealth of industry knowledge, deep technical experience and personal commitment to his clients and engagements. Built up over three decades, Michael has specialist knowledge of the financial services, energy and infrastructure and healthcare sectors, with a particular focus on venture capital and growth start-ups. He provides advice on M&A transactions and corporate actions, including fund establishment, debt and equity raisings and new business ventures with a clear focus on helping clients strategically navigate the complexities of Australia's tax system. His technical focus areas include TOFA, the debt-equity, anti-hybrid and thin

capitalisation rules, international tax and tax treaties including withholding taxes and the 128F exemption and venture capital provisions.

The Hon. Bruce Billson is the Australian Small Business and Family Enterprise Ombudsman (ASBFEO) an independent advocate for small business owners. His office has the legislative powers needed to effectively influence our nation's lawmakers to remove unnecessary obstacles and reduce headwinds so small and family business owners can do what they do best – run their business. The ASBFEO office also provides small businesses and family enterprises with assistance should they find themselves involved in a dispute. The ASBFEO acknowledge owning and operating a small or family business is a big responsibility and a deep personal commitment and thank small and family business owners for their dedication and significant contribution to the economy and our future prosperity. Their mission is to help make Australia the best place to start, grow and transform a business.

Caite Brewer of Hemmant's List has been a Barrister and a Solicitor for more than 28 years. She is one of only five Queensland Law Society (QLS) accredited specialists in succession

law at the Queensland Bar and was the highest achiever in her graduating year. Caite is consistently named 'Market Leader' and 'preeminent' junior counsel in Estate Litigation in Doyle's List. She is a regular presenter at seminars on all things estates and trusts. She has a particular interest in contentious probate and superannuation disputes.

Shaun Cartoon, FTI, is a partner of Arnold Bloch Leibler's tax practice. He advises ASX listed companies, large private groups and high-net-worth individuals. Shaun practices in corporate, international and employment taxes, with particular expertise in mergers and acquisitions, corporate restructures and employee share schemes. He also assists clients to navigate complex tax disputes with the Australian Taxation Office and has litigated significant cases through the Australian courts.

Dr Pip Coore of Hemmant's List, practices predominately in the areas of equity, trusts and succession law. She has also appeared in taxation appeals and administrative law matters. Pip has appeared as counsel in Queensland's Court of Appeal, Supreme Court, Magistrates Court and in the Federal Court of Australia. Pip has been recognised in Doyle's Guide as a Leading Wills and Estates Litigation

Junior Counsel in Queensland. Prior to being called to the Bar, Pip was the Senior Associate to the Honourable Justice Edelman of the High Court of Australia. Pip holds a DPhil in Law and a Master of Studies in Legal Research from the University of Oxford. Pip holds a Bachelor of Laws (Graduate Entry) (Hons) from Queensland University of Technology and a Bachelor of Journalism and a Bachelor of Communication, majoring in Public Relations, from the University of Queensland.

Tracey Dunn is as Director with EY, Private – Tax in Perth. Tracey has a Bachelor of Business (Accounting), a Graduate Certificate in Commercial Law, a Bachelor of Laws and a Graduate Diploma in Legal Practice. Tracey was admitted as a lawyer in the Supreme Court of Western Australia in May 2022. Tracey has worked in public practice for over 20 years. Prior to commencing a career in public practice, Tracey worked in commerce in various roles. Tracey's expertise lies in providing both simple and complex tax advice to high wealth high net worth individuals, private groups, small and medium-sized businesses, and corporate entities. She has significant experience in advising on the application of FBT, Div 7A and trusts and regularly presents on taxation topics.

Presenters

David Hughes, CTA, is a Partner at McCullough Robertson and a Queensland Law Society Accredited Specialist in taxation law. David acts for clients throughout Australia and offshore in relation to navigating cross-border taxation issues, including structuring advice and taxation disputes with the ATO, including audits, objections and running appeals in the High Court, Federal Court and the Administrative Appeals Tribunal against excessive tax assessments. David has also taken court action to prevent the ATO from taking illegal enforcement action, including successfully overturning departure prohibition orders.

John Ioannou, CTA, was admitted as a Solicitor in 2002, is a Principal Lawyer at Macpherson Kelley and leads the national tax practice. He has experience in the areas of tax structuring, tax disputes and commercial transactions. John has a Bachelor of Arts, Bachelor of Laws and a Masters of Law.

Martin Lakos has been one of Macquarie's leading media spokespeople for over 15 years and a public speaker for over 8 years. He is a regular economic and market commentator on the major Australian TV networks as well as CNBC and Bloomberg. Known for his ability to clearly explain complex economic issues and market trends, Martin is passionate about a broad spectrum of issues and

can confidently address an extensive range of topics – from big picture macroeconomics and current trends, to interest rates, investor strategy and what's happening in key global markets. He frequently gives presentations or facilitates panel discussions at conferences around Australia, providing a personalised approach to the key issues facing a specific industry group or business. Having literally grown up in the finance industry where he worked for school holiday pocket money, Martin has always been fascinated by the economy and investment markets. His financial career spans 43 years, having started on the Australian Stock Exchange trading floor in 1979 and he has held roles in Macquarie since 1994, including heading up the Asia institutional sales desk. He was appointed a Division Director of Macquarie Bank in 2006.

Kaitilin Lowdon, ATI, is a Senior Associate in the market-leading taxation practice of Arnold Bloch Leibler. Kaitilin has acted on a variety of high-profile and complex tax audits and disputes with the ATO, advising clients on all stages of the dispute process, including negotiation outcomes with the ATO. Kaitilin advises a range of clients, including high net wealth individuals, some of Australia's largest family groups and public companies.



Presenters

Mark Molesworth, CTA, is a tax partner at BDO and a member of The Tax Institute's SME Technical Subcommittee. He is also a member of the expert advisory panel to the Board of Taxation. Mark has many years of experience in advising taxpayers with respect to all areas of taxation, including CGT, FBT and income tax. He also provides taxation advice to other smaller accounting and legal practices in respect of their clients.

Jacqui Reeves, CTA, is an Associate Director & Head of Tax at BusinessDEPOT, a 'one place for business' that provides an array of professional services to the SME market. With over 15 years' experience in Public Practice and 5 years working in Big 4, Jacqui plays a key role as business and personal tax expert to many high net worth individuals and family owned businesses. Jacqui has a passion for finding solutions to complex tax issues and enjoys working with clients to navigate the best tax outcome for their personal situation.

Mark Reynolds, CTA, is a Tax Partner in Crowe, with over 25 years experience in providing tax advice to clients on both income tax and indirect tax issues.

Mark primarily works with SME clients in the property, retail and not-for-profit sectors, assisting them in all aspects of their business operations.

Jodie Robinson, CTA, is an Accredited Tax Law Specialist and Special Counsel in the tax team with McCullough Robertson Lawyers. Jodie is passionate about providing clients with results-driven, commercial advice and solutions for their taxation and business needs. Jodie regularly advises on the tax consequences of the sale of significant businesses, business restructures, including applicable rollovers and duty exemptions, and holding company interpositions. Jodie also assists clients and their advisors in obtaining private binding rulings and dealing with payroll tax self-review audits.

Andrew Spierings, ATI, is a lawyer in Arnold Bloch Leibler's taxation practice. He acts for high-networth individuals, private groups, public companies and not-for-profits, advising on a range of federal and state taxes in all Australian jurisdictions as well as tax disputes. He holds a Bachelor of Laws with First Class Honours and Bachelor of Commerce from Monash University.



Presenters

Helen Symon KC, is one of Australia's most respected and experienced taxation silks. She practises in both an advisory and a disputes context across the full range of tax law and has appeared in courts and tribunals at all levels, representing both taxpayers and revenue authorities alike. Helen regularly features in Chambers and Partners, Doyles Guide and Best Lawyers 2015.

Kamal Thakkar is the head of Audit & Assurance and Transaction Advisory Services at Kreston Stanley Williamson. Having joined Kreston Stanley Williamson in 2017, he became a partner in 2018. Prior to joining Kreston Stanley Williamson, Kamal was a Partner in a boutique Sydney based firm and Principal at a Top 5 global firm. Kamal has been in the accounting industry since 1997 and moved from London to Sydney in 2005.

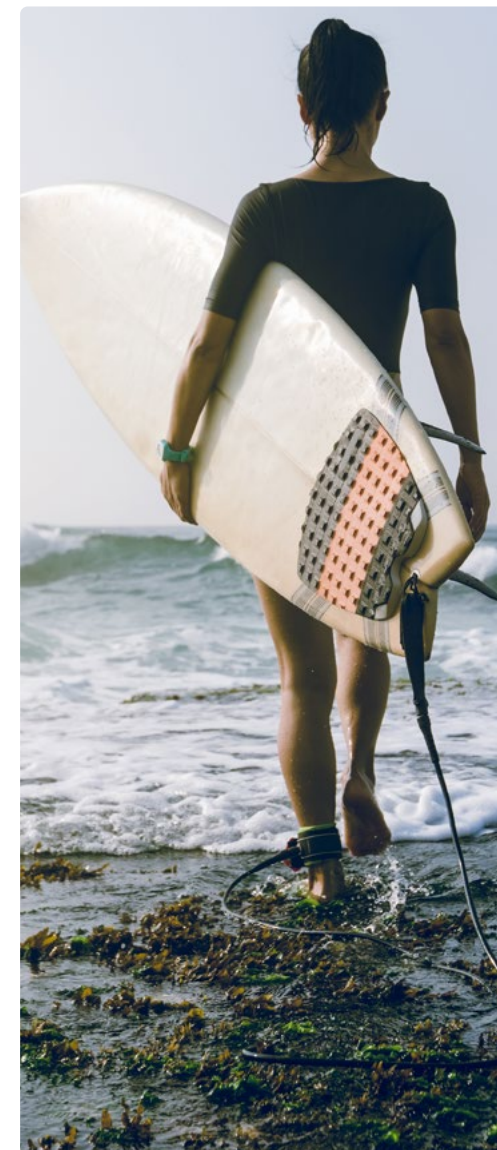
Scott Treatt, CTA, is the General Manager of Tax Policy and Advocacy at The Tax Institute. He is a Chartered Tax Advisor and has been practicing as a tax specialist since 1997, gaining his experience in large 2nd tier and Big 4 accounting firms as well as Government. Through the years he has been engaged on direct and indirect tax issues pertaining to individuals, start-ups, small businesses, private

groups and multinationals, addressing issues including, but certainly not limited to, asset, business and entity transactions and disposals, insolvencies, structuring, succession and disputes (within family groups as well as with the ATO). Scott has a passion for our tax system and tax education, continuously seeking to find opportunities to improve the efficiency and effectiveness of both. He is a regular presenter at industry events and had been a lecturer for some 12 years in The Tax Institute's structured education programs.

Tom Walrut, FTI, is a Senior Associate at Cooper Grace Ward Lawyers with over 14 years' experience in providing tax advice to clients on both State and Federal tax issues. Tom primarily works with SME clients in a broad range of industries advising on tax planning, transactional matters, structuring and general commercial matters. He also regularly acts for clients in taxation objections and disputes with both State and Federal Revenue Authorities.

Ryan Watt, CA, is a tax advisory partner at Crowe New Zealand, based in the Auckland Office. Ryan has many years of experience working with private, SME and multinational businesses who have operations on both sides of the Tasman. Ryan is committed to helping

clients make informed decisions about their business and taxation needs, focussing on providing a commercial and practical outcome. He has considerable experience in a broad range of areas including structuring and general corporate tax matters, high net worth individuals / family offices, property tax and M&A / transaction services.



Venue and accommodation



JW Marriott Gold Coast Resort & Spa

158 Ferny Ave, Surfers Paradise QLD, 4217

JW Marriott Gold Coast Resort & Spa boasts brand-new guest rooms, award-winning service and a covetable location on Australia's Gold Coast. Our redesigned hotel rooms and suites offer an ideal setting to relax after a busy day, complete with high-speed Wi-Fi, plush bedding and pristine marble bathrooms. Wake up feeling refreshed and take advantage of our superb resort facilities, from peaceful saltwater lagoons and an outdoor freshwater pool with a slide to a modern fitness centre and Sport Court®.



Getting there

The JW Marriott Gold Coast Resort & Spa is approximately a 40-minute drive from Gold Coast Airport or an one-and-a-half hour drive from Brisbane Airport.

Parking

Car parking is \$24 per day for self-parking or \$35 per day for valet parking






Accommodation

Favourable room rates have been negotiated and secured at the JW Marriott Gold Coast Resort & Spa. Accommodation bookings can be made through our accommodation and travel provider, Accommodation Link, by following the link on the event web page or via this [link](#).

Please note that as per hotel booking conditions, all accommodation booked is non-refundable. All additional hotel incidentals, including breakfast, remain the responsibility of delegates, and individuals will be responsible for payment of the balance of their account when checking out of the hotel. Please note that extra charges may be incurred for additional guests and will be charged to individual room accounts upon checkout.

Event information

Registration options and inclusions

	Online access to presentations and technical papers	Morning/ afternoon tea/ conference lunches	Retreat dinner & closing drinks networking functions*
Full registration This registration option entitles one delegate to attend the entire event.			

*Additional tickets to the networking functions can be purchased on the registration form.

Early bird registration

All registrations received and paid on or before Friday, 20 January 2023 will be entitled to an early bird discount.

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

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.

Confirmation of registration

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

Continuing Professional Development

Attendance at the conference counts for 13 hours of Continuing Professional Development with The Tax Institute.

The Tax Institute's Attendee Hub

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 functions

Retreat Dinner – Thursday, 16 February 2023

The retreat dinner will be held poolside at the JW Marriott Gold Coast Resort and Spa. The retreat dinner is included in the event registration fee for delegates, and additional tickets can be purchased for accompanying persons and guests at a cost of \$150.

Closing Drinks – Friday, 17 February 2023

Toast the closing of the retreat and continue networking with your peers. The closing drinks is included in the event registration fee for delegates, and additional tickets can be purchased for accompanying persons and guests at a cost of \$50.

Please indicate your requirements, including dietary requirements and requirements for any additional guests, at the time of registration.

Event information

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.

COVID-19 Event Guidelines

At The Tax Institute, the health and wellbeing of our members, delegates and employees is our top priority. Whilst returning to face-to-face events, we continue to actively monitor the situation regarding COVID-19 and follow the latest advice and guidelines issued by the Department of Health, the World Health Organisation and relevant State authorities.

Please note, final implementation of any of these measures is subject to Federal and State Government requirements at the time of each event. To see The Tax Institute's full COVID-19 Event Guidelines, [click here](#).

Cancellation Policy

The Tax Institute reserves the right to alter, amend or cancel all or any of the arrangements contained in the program. Should a face-to-face event be cancelled due to an event beyond The Tax Institute's reasonable control including 'an act of god', 'pandemic', 'health-related event' or 'government requirements', we will endeavour to transition the registration to the new date or transition their registration to another event, provide a full refund or hold the amount as credit to be used in the future. 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.

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.

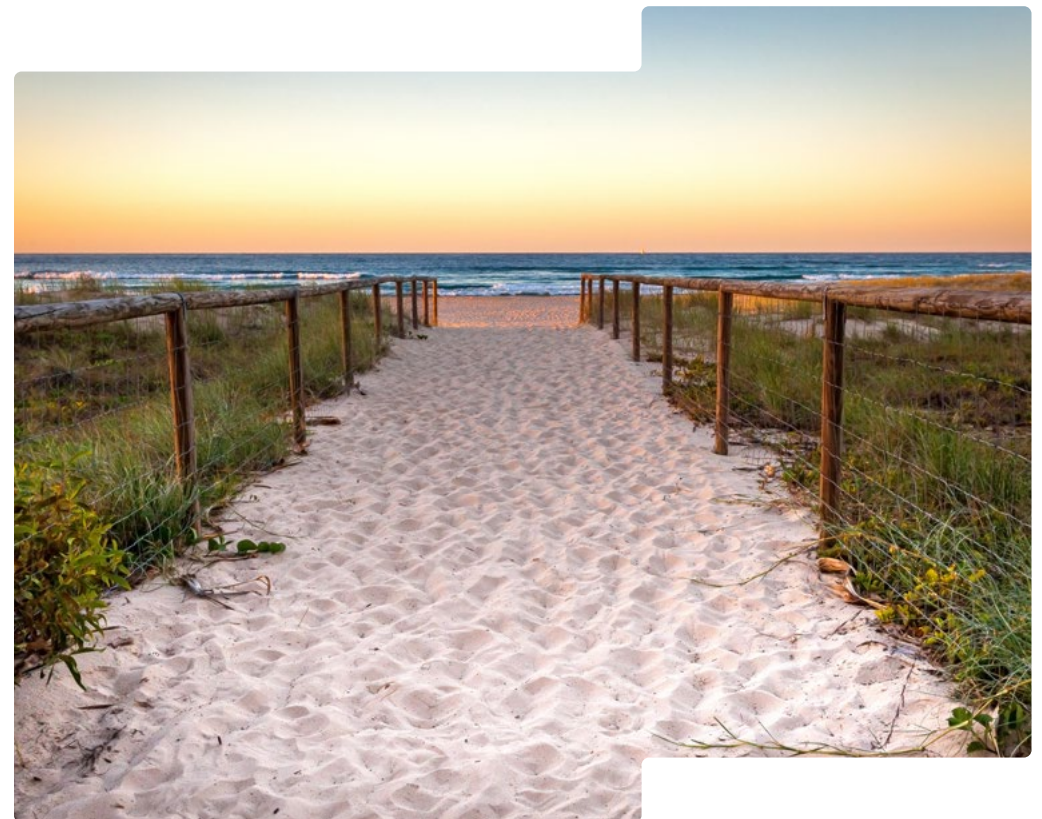
Privacy

We take your privacy seriously, and our policy can be viewed at: <https://www.taxinstitute.com.au/about-us/privacy-copyright-disclaimer>.

Enquiries

For further information regarding this event, please contact the Events Team on 1300 829 338 or nationalevents@taxinstitute.com.au.

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



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 see page 13 for registration inclusions.

Full registration – 13 CPD hours

	Member	New member*	Non-member
Early bird registration Received on or before 20 January 2023	<input type="checkbox"/> \$1,750	<input type="checkbox"/> \$2,090	<input type="checkbox"/> \$2,050
Standard registration Received after 20 January 2023	<input type="checkbox"/> \$1,950	<input type="checkbox"/> \$2,290	<input type="checkbox"/> \$2,250

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

Promotional code:

Retreat Dinner

The Retreat Dinner is INCLUDED in the registration fee for delegates attending the full conference.

Thursday, 16 February: Poolside, JW Marriott Gold Coast Resort & Spa

- Yes, I WILL be attending the Retreat Dinner OR
 No, I WILL NOT be attending the Retreat Dinner
 Yes, I require additional tickets for the retreat dinner at \$150 per person

No. x tickets at \$150 each: \$

Dietary requirements:

Closing Drinks

The Closing Drinks is INCLUDED in the registration fee for delegates attending the full conference.

Friday, 17 February: JW Marriott Gold Coast Resort & Spa

- Yes, I WILL be attending the Closing Drinks OR
 No, I WILL NOT be attending the Closing Drinks
 Yes, I require additional tickets for the Closing Drinks at \$50 per person

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

Dietary requirements:

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:

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

*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 for the first 12 months
- 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

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:

3 Payment summary

Registration fees	\$	<input type="text"/>
Additional guest tickets – Retreat Dinner (\$150 each)	\$	<input type="text"/>
Additional guest tickets – Closing Drinks (\$50 each)	\$	<input type="text"/>
Total payable	\$	<input type="text"/>

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

4 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.

For event enquiries, please contact the National Events Team on **1300 829 338** or nationalevents@taxinstitute.com.au

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

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To register

Email customeradmin@taxinstitute.com.au

Mail L37, 100 Miller Street North Sydney NSW 2060

Online taxinstitute.com.au

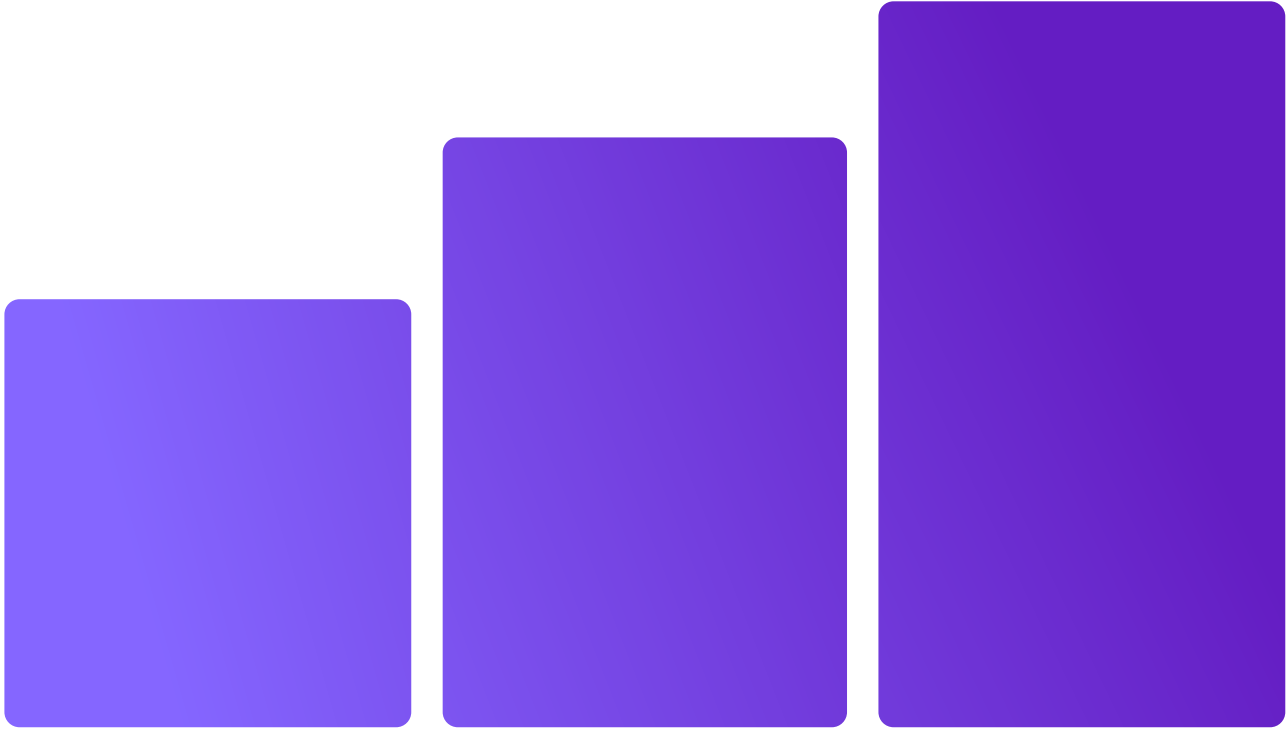
Thank you.

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





Dominic Moon, ATI, Macpherson Kelley
(Chair, Private Business Tax Retreat Organising Committee)
Neil Brydges, CTA, Sladen Legal
Linda Farmer, CTA, Tax LF
Kaitlin Lowdon, ATI, Arnold Bloch Liebler
Steven Lutz, CTA, Lutz & Associates
Melinda Peters, CTA, McCullough Robertson
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