



THE TAX INSTITUTE

2017 Private Business Tax Retreat

Sponsorship Prospectus

25–26 May 2017
The Palazzo Versace Hotel, Gold Coast



About The Tax Institute



THE TAX INSTITUTE

The Tax Institute is Australia's leading education and professional organisation in tax, with over 70 years of expertise. We service the profession in its entirety, and represent accountants, tax professionals, lawyers, tax agents, corporations, government, academics and students.

In an ever-changing landscape, we work closely with our members, boards and committees to stay at the forefront of the industry, which in turn raises the profiles of our members and our professional associates. Membership of The Tax Institute provides tax professionals with the tools and resources they need to enhance their careers; from publications, journals, access to CPD at events and education courses, as well as access to a community of their peers.

Our membership base of almost 12,000 is predominantly made up of a range of tax levels and industries from directors, owners, partners and principals from the Big 4, mid-tier, corporate, legal and SME markets. Thus highlighting our diverse group of tax professionals within our member base who attend our events, undertake our education courses and receive our publications.

About the Private Business Tax Retreat

Now in its seventh year, the Private Business Tax Retreat is a unique opportunity for advisers to private business to stay up to date with the latest changes in the industry; ensuring they can continue to deliver the high-level advice that clients rightfully expect. The retreat provides two days of informative and educational seminars and is expected to draw over 100 industry professionals to the Palazzo Versace Hotel on the Gold Coast. This is a well-supported event by senior practitioners from around the country and is a significant event on The Tax Institute's calendar.

Benefits of being a sponsor of the Private Business Tax Retreat

The Private Business Tax Retreat brings together the leading industry professionals from both local and interstate, giving sponsor's unparalleled opportunities to reach decision-makers. Importantly, as a sponsor of the 2017 Private Business Tax Retreat, we can:

- Provide you with the opportunity to build relationships with high net worth individuals and decision-makers from SME, mid-tier, Big 4 and top-tier accounting and legal firms.
- Offer a greater percentage of decision-makers in attendance compared to other accounting bodies. This will result in greater sales opportunities.
- Tailor sponsorship packages to ensure you receive a high return on investment.
- Offer cost effective sponsorship opportunities which can be scaled to address sponsors individual requirements
- Provide you with opportunities to showcase your expertise, and offer solutions to your target market in an environment that advertising cannot match.
- Offer you access to a referral market via our member's clients

Firms Represented at the 2016 Private Business Tax Retreat

Advanced National Services
Australian Taxation Office
Autopia
Balena Tassa Pty Ltd
BDO
Bennett Partners
Boss Private Clients
BusinessDEPOT
Camphin Boston
Chapman Eastway
Clear Advisory Pty Ltd
Corpassist Pty Ltd
Cowley Partners
Crowe Horwath
David Sen Chartered Accountants
Deloitte Private
DKM Group
Douglas & Harrison
Grahame Raftery & Co
Grant Thornton
Griffin Group Accountants Pty Ltd
GTH Accounting Group
H N Williams Pty Ltd
Hallahan & Co

Hanrick Curran
Harvey Allatt & Co Pty Ltd
Holmans
Jock Ryngiel
Kelly Partners Tax Consulting Pty Ltd
Keystone Private Pty Ltd
KPMG
KR Blacker & Associates
Love & Partners
Lutz & Associates
Madison Marcus Law Firm
McConachie Stedman
McCullough Robertson
MGD Wealth
Mills Oakley Lawyers
Mind Rocket
Moore Stephens Queensland
Moore Family Enterprise
Mutual Trust Pty Ltd
Nexia Australia
O C Grant - Tax Agent & Accountant
O'Keefe Accounting Pty Ltd
P A Clulow - Registered Tax Agent
Paul D Harris Chartered Accountants

Pearson Partners
Perpetual
Pilot Partners
Pluta Accountants
PwC
Ray White Group
Ryall Mackenzie Pty Ltd
Satellite Accounting Pty Ltd
Schonfeld Consulting
Sladen Legal
Small Myers Hughes
Stega Accountants
Tabouli Holdings Pty Ltd
TaxBanter Pty Ltd
The Myer Family Company Limited
The Victor Smorgon Group
Thomson Geer Lawyers
Trumans
V J Ryan And Co Services Pty Ltd
WallaceHMMW
West Carr & Harvey
Westcourt Pty Ltd
WMS Chartered Accountants
Wolters Kluwer

Hear from some of our long standing sponsors

The Tax Institute has a long history of working in partnership with the leading players. Some of our long-standing event sponsors include HSBC and Wolters Kluwer (CCH).



HSBC Australia has been in partnership with The Tax Institute since 2005, and promotes a range of retail banking services and products to Institute members.

"The Tax Institute plays an integral role in HSBC's marketing and business development to their members; as a business alliance partner, HSBC attends a number of major Institute conferences each year and has found these events to be a valuable means of engaging delegates and obtaining new business opportunities. The Tax Institute has consistently offered strong support and an open, collaborative approach for these events and in the development of wider communication strategies to ensure that our specific needs as a business partner are met."



"Wolters Kluwer (CCH) is proud to be a long-time business alliance partner of The Tax Institute, providing a range of exclusive benefits to Institute members across our product and service offerings. Our presence at Institute events and advertising in *Taxation in Australia* connects us with thought leaders and decision-makers in the tax profession. We are always impressed with the professionalism and support offered by the Institute to help us meet our strategic objectives."



Previous sponsors of the Private Business Tax Retreat



Intelligent Car Ownership



Retreat packages and pricing

Platinum \$4500	Gold \$3000	Silver \$1500	Bronze \$500
<p>All entitlements included in the Gold Package plus:</p> <p>Branding</p> <ul style="list-style-type: none"> • Opportunity to display one standard size pull up banner in the session room • Splash screen advertisement on the event app <p>Networking Opportunities</p> <ul style="list-style-type: none"> • A one-minute speech to delegates at a time to be determined by The Tax Institute. 	<p>All entitlements included in the Silver Package plus:</p> <p>Branding</p> <ul style="list-style-type: none"> • Interactive banner advertisement (across whole event app) <p>Networking Opportunities</p> <ul style="list-style-type: none"> • Opportunity to host a business card draw • A 30 second 'sponsor blurb' to be delivered by the session chairperson <p>Refreshment</p> <ul style="list-style-type: none"> • Attendance for two to the networking drinks and dinner to be held on Thursday 25 May, 2017 	<p>All entitlements included in the Bronze Package plus:</p> <p>Branding</p> <ul style="list-style-type: none"> • Company signage in the registration foyer (i.e. pull up banners) <p>Networking Opportunities</p> <ul style="list-style-type: none"> • Dressed trestle table and two chairs set up in the registration foyer • An electronic copy of the delegate list <p>Refreshment</p> <ul style="list-style-type: none"> • Morning tea, lunch and afternoon tea refreshments for two representatives 	<p>Branding</p> <ul style="list-style-type: none"> • Company logo featured in the electronic copy of the event brochure • Logo featured in the hardcopy event delegate folder • Mention of your company via The Tax Institute social media posts • Logo and contact details on the 'Sponsors' tab of the event app • Provide each session attendee with a company brochure (delivered by seat drop)



Tailored sponsorship and advertising package

Maximise your exposure with a tailored sponsorship and advertising package

Get even more out of your Private Business Tax Retreat sponsorship by utilising our other advertising channels to maximise brand exposure before, during and after the event.

We will work closely with you to help you achieve the exposure your brand requires. By sitting down and discussing your goals, branding objectives and campaign's focus, we can create a personalised sponsorship and advertising package that will help you achieve results and meet your business objectives.



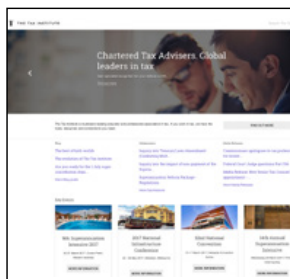
Taxation in Australia

Taxation in Australia is the tax profession's most sought-after and influential technical publication. It is published exclusively for 12,000 Institute members, with a readership of 1.5 (over 17,000).



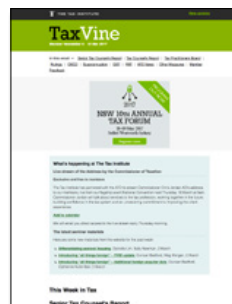
The Tax Institute app

The Institute's flagship journal, *Taxation in Australia*, is also available for iPad and Android and includes our tablet-exclusive supplement magazine 'Extra'. Our app averaged 5,000 active users per month during 2014-15 and has just been revamped and relaunched with new features and content.



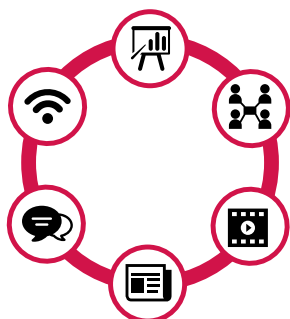
Our website

With 100,000 impressions per month, our website is one of the first resources used by practitioners seeking the latest information on tax. Rotating ads across our site include hyperlinks to your landing page or brand site.



TaxVine

Opened by 4,500 people each week, this weekly newsletter provides exclusive advertising space limited to one external advertiser per issue. Delivered on Friday, and optimised for mobile devices for extra management, you can reach your target market on the go.



Content Marketing

Content marketing is fast becoming the most important marketing tool. We have an internal team who custom create content marketing programs that combines an active, targeted content marketing campaign and advertising program utilising our website, social media, exclusive weekly member newsletter (*TaxVine*) and member journal in print and digital (*Taxation in Australia*) to generate increasing awareness of your company's products and services.

ADDITIONAL ADVERTISING OPTIONS

The Tax Institute offers a range of additional advertising options to complement your event sponsorship, including our prestigious monthly journal *Taxation in Australia*.

2017 Private Business Tax Retreat Program

Day one – Thursday 25 May 2017

Time	Session	Presenter(s)
8.00am	Registration*	Pre-Function Foyer
9.00am–9.15am	Official Opening	Steve Healey, CTA, Co-Chair, 2017 Retreat Organising Committee
9.15am–9.30am	President's Welcome	Matthew Pawson, CTA, President – The Tax Institute
9.30am–10.30am	Keynote Address: Technology and its Impact on Professionals	Dr Baden U'ren, Assistant Professor of Entrepreneurship, Bond University
10.30am–10.45am	Morning tea*	Pre-Function Foyer
10.45am–12.00pm	Plenary 1: The Future Tax Practice	Steve Healey, CTA, Grant Thornton Tim Roach, ATO
12.00pm–12.45pm	Plenary 2: Superannuation and Wealth Management for Private Business – The Next Frontier?	Chris Wyeth, CTA
12.45pm–1.45pm	Lunch*	Ill Barocco Restaurant
1.45pm–2.30pm	Plenary 3: Superannuation and Wealth Management for Private Business – Dealing With Current Structures	Laura Hanrahan, HopgoodGanim Lawyers
2.30pm–3.30pm	Plenary 4: The Expanding Offshore Client – How Div 7A (And Other Rules) Are Taken With You And How to Manage Them	Cameron Blackwood, ATI, Greenwoods & Herbert Smith Freehills
3.30pm–3.45pm	Afternoon tea*	Pre-Function Foyer
3.45pm–4.45pm	Plenary 5: Valuations	Tim Kyle, CTA, Greenwoods & Herbert Smith Freehills
4.45pm–5.00pm	Day One Wrap Up – Questions and Close	Steve Healey, CTA, 2017 Retreat Organising Committee
5.00pm–6.15pm	Free time	
6.15pm–7.00pm	Pre-dinner drinks*	
7.00pm–11.00pm	Official dinner*	

Day two – Friday 26 May 2017

Time	Session	Presenter(s)
9.00am–10.00am	Plenary 6: Dealing with Difficult Structures – Preparing For The Future – Part A	Linda Tapiolas, CTA, Cooper Grace Ward Lawyers
10.00am–10.15am	Morning tea*	Pre-Function Foyer
10.15am–11.00am	Case Study: Transition Planning – Part B	Linda Tapiolas, CTA, Cooper Grace Ward Lawyers
11.00am–12.00pm	Plenary 7: Emerging Issues for Private Businesses Conducted Via Trusts	Daniel Smedley, CTA, Sladen Legal
12.00pm–1.00pm	Lunch*	Ill Barocco Restaurant
1.00pm–1.30pm	Case Study: SMSFs Taking Interests in Unit Trusts in Light of New Developments	Daniel Smedley, CTA, Sladen Legal
1.30pm–2.30pm	Plenary 8: Tax Developments You Can't Miss	Fiona Knight, ATO David Hughes, CTA, Small Myers Hughes
2.30pm–2.45pm	Afternoon tea*	Pre-Function Foyer
2.45pm–3.45pm	Plenary 9: Taxing Your Way to Sale of Business Property	Facilitator: Steve Healey, CTA, Grant Thornton Panel members: Tim Roach, ATO Daniel Smedley, CTA, Sladen Legal Linda Tapiolas, CTA, Cooper Grace Ward Lawyers Chris Wyeth, CTA,
4.30pm–4.45pm	Retreat Close	Steve Healey, CTA, Co-Chair, 2017 Retreat Organising Committee

*Conference networking opportunities.

Please note: Timetable subject to change at The Tax Institute's discretion

How to become a sponsor

The Tax Institute is committed to working closely with all of our business alliance partners and sponsors to help ensure the best possible outcome at all of our events. Along with our standard exhibition offerings, we encourage any ideas or further offerings that you may have to help maximise delegate interaction and increase your all-round event experience.

After reviewing this document, the following steps can be undertaken:

- Submission of questions/suggestions
- Further information provided as required
- Agreement of costs, terms, clauses and conditions and contract signed by both parties.

If you'd like to become a sponsor of The Tax Institute's 2017 Private Business Tax Retreat, or if you would like to find out more, please contact Katie Redhead on 07 3225 5200 or katieredhead@taxinstitute.com.au.





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CONTACT DETAILS

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(artwork and insert delivery)

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