



THE TAX INSTITUTE

2017 PRIVATE BUSINESS TAX RETREAT

The new frontier is here

What does it mean for private businesses and their advisers?

25–26 May 2017

The Palazzo Versace Hotel, Gold Coast

Preferred Partner:



WELCOME

2017 Private Business *Tax* Retreat

On behalf of the organising committee, we are delighted to invite you to participate in the 2017 Private Business Tax Retreat to be held at the Palazzo Versace Hotel on the Gold Coast.

The environment for tax advisers to private businesses continues to change at a rapid rate. We are not only facing changes to our legislative and policy framework as it endeavours to keep up with changes in the economy and business attitudes, we are also seeing technology advances that are eroding traditional areas of work of professionals and revenue authorities.

To assist, The Tax Institute is identifying many areas where professionals will need to change their thinking to better adapt to technological changes, capitalise on transforming dealings with the ATO, effectively gather and use data, understand how new savvy businesses operate and add greater value as an external consultant or an in-house adviser. The benefits to be gained from changes in these areas are as evident in a privately owned business environment as in other sectors. Our program is going to dig deep into what the tax professional will have to cope with and explore how that can make us more relevant to businesses that are themselves changing to become more efficient.

The advent of new data usage and evolving interactions with the ATO is an issue in itself, and we will again welcome the presence of key ATO officers who will bring their knowledge of ATO best practice. We will also cover key technical developments such as superannuation and small business rollovers that directly relate to managing the future ownership of private business in Australia – as the population ages and wealth accumulates for private business owners.

We want you to leave this event far better equipped to take your professional life forward as a valuable adviser in the new frontier!

As a result, this retreat will benefit all advisers to private businesses – professionals wanting to grow a practice as a valuable contributor to the growth of private businesses, and private business executives who have a keen interest in how ongoing tax changes and taxation outcomes influence private businesses and their ability to successfully grow.

**Early bird offer – Register on or before
Monday 3 April 2017 to save!**

Why you should attend

Now in its seventh year, this event continues to be a unique opportunity for advisers to private businesses to interact in an environment that allows them to drill down on coalface issues in a manner that ensures they can continue to deliver the high-level advice that clients rightfully expect. There is no other event quite like it for those with an interest in private business taxation issues. It is well supported by senior practitioners from around the country and is a significant event on The Tax Institute's calendar.

Thank you

Thank you for all the feedback we received regarding last year's event. This ongoing feedback from regular supporters of this event is most welcome and helps us plan for future events as we continue to strive to make this retreat one that provides an essential forum covering areas of great relevance for attendees.

Finally, a special thanks to the organising committee for the time, energy and support they have contributed to ensuring that the 2017 Private Business Tax Retreat maintains the high standards of similar events over the years in Queensland.

I look forward to meeting you on the Gold Coast for what will be a truly exceptional retreat-style event in the wonderful surrounds of the Palazzo Versace.

Steve Healey, CTA

Co-Chair, 2017 Retreat Organising Committee

John Ioannou, CTA

Co-Chair, 2017 Retreat Organising Committee

The Tax Institute gratefully acknowledges the generous assistance of members of the 2017 Private Business Tax Retreat Organising Committee:

Paul Banister, CTA, *Grant Thornton*

Stephanie Caredes, CTA, *The Tax Institute*

Fiona Dillon, CTA, *Australian Taxation Office*

Peter Godber, CTA, *Grant Thornton*

Steven Lutz, CTA, *Lutz & Associates*

Andrew White, ATI, *Greenwoods & Herbert Smith Freehills*

TECHNICAL PROGRAM

Day one – Thursday 25 May 2017

Time	Session	Presenter
8.00am–9.00am	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 “The Future”, as they say, is headed our way. As Assistant Professor of Entrepreneurship – Bond Business School, Dr Baden U'Ren regularly tours the majors in “Silicon Valley” in the United States to follow their literally world-changing developments. He will advise on how this staggering array of new technology will most likely impact us in Australia and, specifically, our profession's service model. Find out how to cope with such change and stay relevant to your client base and their needs in the future, by learning: <ul style="list-style-type: none"> ▪ What should we be doing now/soon? ▪ What timeframe should we operate within? ▪ How will universities change the way and content they teach students destined for the professional advisory world? ▪ The general principles to guide private business advisers into this new world. 	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 We find ourselves in a time where the only real constant is change. What does this mean for the tax profession and for your practice? It will be necessary to remain agile and adapt in terms of both what we do for our clients and how we deliver. This session will cover: <ul style="list-style-type: none"> ▪ What the tax system will look like in the future ▪ How will this affect your tax practice? ▪ How to prepare your practice for being “disrupted” ▪ In light of increasing automation, for example the use of “artificial intelligence”, what tax services will clients require from their private business advisers? ▪ What is the ATO doing? 	Steve Healey, CTA Grant Thornton Tim Roach ATO
12.00pm–12.45pm	Plenary 2: Superannuation and Wealth Management for Private Business – The Next Frontier? Liberating wealth from operating structures is important for business owners to protect accumulated wealth while keeping business balance sheets hungry. During the past two decades, superannuation has featured strongly in this planning due to concessions on entry into the superannuation system and beyond. As private business owners and their advisers come to grips with the 1 July 2017 changes, this session examines how private business owners should approach wealth planning in future. It will cover: <ul style="list-style-type: none"> ▪ How superannuation rules help facilitate the typical speed up of investment between ages 50 and 60 ▪ If there should be a superannuation first approach, or should superannuation be abandoned altogether? ▪ How effective other options like negative gearing and insurance bonds are? ▪ What strategies are most vulnerable to future reform? 	Chris Wyeth, CTA
12.45pm–1.45pm	Lunch – Il Barocco Restaurant	

TECHNICAL PROGRAM

Day one – Thursday 25 May 2017 (cont.)

Time	Session	Presenter
1.45pm–2.30pm	Plenary 3: Superannuation and Wealth Management for Private Business – Dealing With Current Structures The superannuation reforms to be fully implemented from 1 July 2017 have killed the sacred cow. Despite hundreds of rule changes over the years, no previous reforms have so dramatically affected wealth already in the superannuation environment. This session will use case studies to demonstrate how family groups may address structures and plans that were implemented prior to these reforms. Structures and plans that will be considered include: <ul style="list-style-type: none"> ▪ Providing funding for existing investment, including meeting financing requirements of limited recourse borrowing arrangements and private unit trust investment ▪ Managing self-managed superannuation fund (SMSF) transition requirements for more complex pension structures, including previously grandfathered income streams such as complying pensions and market-linked pensions ▪ Transition planning for ‘asset heavy’ self-managed superannuation funds. 	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 Private businesses that head offshore understand that managing taxes can be a little more complex. While the usual provisions may be readily known, their application to offshore clients is not. In the hustle and bustle of considering controlled foreign companies (CFCs) and transferor trust rules (or perhaps not ...), Div 7A lies in wait to deliver the blow that the other regimes may not. Division 7A is often only associated with resident, closely held groups, but its application is far broader. This session will consider: <ul style="list-style-type: none"> ▪ What a CFC is? When is income from active business and when is that not enough to save you ▪ Transferor trusts ▪ Section 99B of ITAA36 ▪ How Div 7A and other “domestic” compliance rules fit into the mix. 	Cameron Blackwood, ATI Greenwoods & Herbert Smith Freehills
3.30pm–3.45pm	Afternoon tea - Pre-function Foyer	
3.45pm–4.45pm	Plenary 5: Valuations The concept of market value performs numerous and important roles for tax purposes. However, the process of determining market value can involve a number of tricks and traps – and is increasingly a source of dispute between taxpayers and the ATO (as well as other revenue authorities). This session develops a robust approach to the process of determining market value for tax purposes, in light of matters which impact how a valuer is to be properly instructed, such as: <ul style="list-style-type: none"> ▪ The various specific statutory provisions and regulations ▪ The statutory context of the relevant provision ▪ The ATO approach to valuation issues, as set out in its guidelines ▪ The different approaches taken by courts in resolving market value issues – with a focus on recent private business income tax cases ▪ The numerous instances where the legal meaning of market value departs from international valuation guidelines. 	Tim Kyle, CTA Greenwoods & Herbert Smith Freehills
4.45pm–5.00pm	Day One Wrap Up – Questions and Close	Steve Healey, CTA Co-Chair, 2017 Retreat Organising Committee
5.00pm–6.15pm	Free time	
6.15pm–7.00pm	Pre-dinner drinks – Le Jardin Lobby	
7.00pm–11.00pm	Official dinner – Vanitas Restaurant	

TECHNICAL PROGRAM

Day two – Friday 26 May 2017

Time	Session	Presenter
7:00am–9.00am	Breakfast – II Barocco Restaurant	
9.00am–10.00am	Plenary 6: Dealing with Difficult Structures – Preparing For The Future – Part A When assisting clients on how to plan for the future, one usually begins with the end in mind, which incorporates focus on the “planned end” like a trade sale or family transfer while maintaining flexibility for the unplanned. Care needs to be taken when doing the ground work to ensure that clients can maintain and realise value both now and in the future. As well as addressing most of the income tax rollovers and concessions that are useful to help restructure value, this session will also consider: <ul style="list-style-type: none"> ▪ Intellectual property, social media and ownership ▪ Managing valuation issues involving complex structures taking into account cases, affiliates and connected entities ▪ Whether Subdiv 328-G helps in these situations? ▪ Buyer versus seller considerations. 	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 Case study review of Plenary 6: This factual case study involves an operating business conducted through a partnership of trusts, where IP is owned in partnership by associated individuals. It addresses the parties’ desire to restructure, which involves dealing with: <ul style="list-style-type: none"> ▪ Difficult IP ownership ▪ Non-income tax considerations ▪ Primary source document requirements. 	Linda Tapiolas, CTA Cooper Grace Ward Lawyers
11.00am–12.00pm	Plenary 7: Emerging Issues for Private Businesses Conducted Via Trusts While trusts remain the vehicle of choice for private business, there continues to be an evolution on the issues affecting their use in practice. We have seen new or refreshed interpretations of provisions significantly affect private trusts. The session will reflect on the history of this and will look ahead to other trust provisions and areas of practice currently in play and what is around the corner, including: <ul style="list-style-type: none"> ▪ Issues identified by the ATO Trust Taskforce ▪ Appropriate treatment of seven-year subtrusts coming to an end ▪ Life cycle planning with the small business restructure rollover relief ▪ New strategies for succession planning and the single discretionary trust ▪ Family trust distribution tax - meaning of “distributes” ▪ Fixed trusts and the Practical Compliance Guideline. 	Daniel Smedley, CTA Sladen Legal
12.00pm–1.00pm	Lunch – III Barocco Restaurant	
1.00pm–1.30pm	Case Study: SMSFs Taking Interests in Unit Trusts in Light of New Developments This practical case study will examine the common approach of self-managed superannuation funds taking interests in unit trusts (whether related or not) in light of contemporary views on relevant practice areas such as: <ul style="list-style-type: none"> ▪ Non-arm’s length income ▪ Revenue/capital distinction ▪ Fixed trust issues ▪ The impact of the new superannuation rules. 	Daniel Smedley, CTA Sladen Legal

TECHNICAL PROGRAM

Day two – Friday 26 May 2017 (cont.)

Time	Session	Presenter
1.30pm–2.30pm	Plenary 8: Tax Developments You Can't Miss This session provides two experts analysing, in depth, some key changes over the last year, from court cases, legislative changes, ATO rulings or other significant developments which may have slipped “under the radar” of practitioners’ attention. What profound implications arise from these changes, while not immediately apparent, are essential to know?	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 Holding real estate interests is a common feature in private business structures. And just as business owners can be innovative in growing their businesses to adapt to changing needs, they can be equally so in capitalising on their property positions. This session will focus on the income tax treatment of a private group's property assets, including: <ul style="list-style-type: none"> ▪ How the latest pronouncements regarding the revenue vs capital distinction may influence how a private business may exploit or impact their property holdings ▪ Maintaining appropriate documentation to support your intention ▪ How to preserve capital gains tax concessions on business property, especially after the business may have ceased or been sold ▪ Dealing with changes in the use of property holdings during the ownership period. 	Fletch Heinemann, CTA Cooper Grace Ward Lawyers Sarah Dewar Cooper Grace Ward Lawyers
3.45pm–4.30pm	Panel Session: Everything you wanted to know but were afraid to ask Our expert panel has been assembled to answer those burning questions you would like to ask. Covering some of the key areas of focus over the two days, our panel will be able to provide an interactive review of the retreat and cover off on any additional issues that may arise in the course of their presentations. You will have the opportunity to submit questions in advance and also “live” during the retreat. You will also be able to submit your questions anonymously using our event app.	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	Retreat Close	Steve Healey, CTA Co-Chair, 2017 Retreat Organising Committee

PRESENTER PROFILES

An *overview* of our experts

Cameron Blackwood, ATI, brings more than a decade of transactional tax expertise to his role as Director in Greenwoods & Herbert Smith Freehills' Sydney office. He specialises in advising clients on the tax complexities of mergers, acquisitions and restructures, including cross-border issues and all aspects of employee share schemes, and regularly works in close collaboration with Herbert Smith Freehills. After joining Greenwoods & Herbert Smith Freehills as a graduate in 2004, Cameron built his corporate experience advising companies on a wide range of advisory and compliance matters, including a secondment to BHP Billiton. His industry knowledge is broad and includes the mining, real estate and financial services sectors. Cameron is a member of The Tax Institute's Large Business and International Committee and the NSW Technical Committee. He holds a Bachelor of Business (Hons) and Bachelor of Laws (Hons) from the University of Technology Sydney, and a Master of Taxation from the University of Sydney. Cameron is admitted as a solicitor in New South Wales.

Sarah Dewar is an associate in the tax team at Cooper Grace Ward Lawyers. She advises and acts for clients in a variety of disputes with Australian revenue authorities. Sarah's technical experience includes representing taxpayers in disputes involving income tax, GST, payroll tax and stamp duty. Sarah regularly acts for taxpayers involved in ATO debt and insolvency proceedings as well as summary prosecutions. Sarah's experience includes preparing notices of objections, private ruling applications and managing appeals in the Administrative Appeals Tribunal, the Federal Court and Supreme Court of Queensland. Drawing on a background in commercial litigation, she has particular experience in evidentiary issues during litigation.

Laura Hanrahan of Hopgood Ganim Lawyers practises exclusively in the areas of superannuation, estate planning and administration. She assists clients in a range of matters including wills, testamentary trusts, powers of attorney, superannuation, family discretionary trusts and the administration of deceased estates. With a background that includes family law, business services and taxation, Laura is experienced to deal with the variety of issues associated with preparing comprehensive estate plans for clients.

A member of the Society of Trust and Estate Practitioners and the SMSF Association, Laura regularly presents papers on relevant superannuation and estate matters to various industry audiences.

Steve Healey, CTA, is a partner with Grant Thornton and leads the tax and private advisory service lines for the firm in Australia. He has in excess of 23 years professional experience advising some of Queensland's largest listed and government-owned entities and transactions in addition to advising many privately owned enterprises. Steve has been involved with The Tax Institute for many years. He was National President of the Institute in 2015, is a past Queensland State Chairman and is a member of the Queensland State Council. Steve is also a member of the Advisory Panel to the Board of Taxation.

Fletch Heinemann, CTA, is a partner in the Cooper Grace Ward Lawyers commercial team. He assists clients by providing tax advice across a range of commercial issues. He is also responsible for managing a significant volume of tax and customs disputes. His experience includes providing upfront advice, assisting with audits and objections, and managing Administrative Appeals Tribunal appeals and litigation in the Federal Court. His technical specialisations include income tax, GST, and state taxes and duties in relation to property transactions. Fletch has also presented sessions at The Tax Institute's Queensland seminars and national conferences and has published papers on topical income tax, GST and customs issues.

David Hughes, CTA, is a Partner at Small Myers Hughes and a Queensland Law Society Accredited Specialist in taxation law who is passionate in his defence of taxpayers against unfair action from the ATO. David acts for clients throughout Australia and New Zealand in relation to navigating cross-border taxation issues. He has had great success acting for taxpayers in taxation disputes with the ATO, including running appeals in the High Court, Federal Court and the Administrative Appeals Tribunal against excessive tax assessments, and has been successful in having assessments substantially reduced – in many instances to nil. David has also taken court action to prevent the ATO from taking illegal enforcement action, including successfully overturning



PRESENTER PROFILES

An *overview* of our experts

departure prohibition orders, obtaining private rulings and favourable objection decisions from the ATO, as well as negotiating satisfactory outcomes for taxpayers with the ATO, including reducing tax, penalties and interest, and obtaining favourable payment terms.

Fiona Knight is an Assistant Commissioner at the ATO. She has 20 years experience in taxation law and currently works in the Tax Counsel Network providing advice on the most complex tax technical issues, including audits, rulings, litigation and legislative changes. She is a member of the ATO's General Anti-Avoidance Rules (GAAR) Panel. Previously, Fiona has worked in the Large Business & International and Litigation areas of the ATO. Fiona has a Bachelor of Laws (Hons) and a Bachelor of Commerce from the University of Melbourne. She has a Masters of Taxation from the University of New South Wales and an Executive Masters of Public Administration from the University of Melbourne. Fiona is admitted to practise as a Barrister and Solicitor of the Supreme Court of Victoria and is admitted as a Chartered Tax Adviser by The Tax Institute.

Tim Kyle, CTA, is a Director of Greenwoods & Herbert Smith Freehills, based in the Sydney office. He advises clients on a wide range of income tax matters, including mergers and acquisitions, capital management, cross-border dealings, market value issues, audits and tax litigation.

Matthew Pawson, CTA, is a Consultant Lawyer and previous Managing Director at Rae & Partners in Launceston, Tasmania and formerly the Managing Partner of Peter Worrall Lawyers. He has been practising as a commercial lawyer for 17 years. Matthew specialises in complex commercial and property transactions, business structuring, corporations law, succession planning, estate planning and tax advice, and has advised many businesses and community organisations about corporate governance issues. After being appointed to the Tasmanian State Council of The Tax Institute, Matthew served as State Chair in 2012-13 and has contributed to the organisation and running of numerous CPD events offered by The Tax Institute in Tasmania. During the period 2010-15, Matthew completed six years service as a National Councillor for Tasmania,

where he variously held the positions of National Treasurer, Chair of the Information Products Working Group and member of the Investment and Audit Committees of The Tax Institute. Matthew served as National Vice President in 2016 and is now President. Matthew is also a regular presenter and author for the Law Society of Tasmania on GST and other commercial law and practice management topics, and a guest lecturer for the University of Tasmania Postgraduate Legal Practice Training program.

Tim Roach has been Assistant Commissioner of Tax Practitioner and Lodgement Strategy at the ATO since February 2013. Tim has national responsibility for the Partner Relationship stream which leads a number of projects under the "Working with our Partners in the Tax and Super Systems Program". Tim also has responsibility for the Client Engagement Data Implementation and Integration stream which acts as an interface between Smarter Data and the Client Engagement Group. Tim has a Masters of Taxation and worked for the ATO in a number of roles from 1997 to 2009 when he joined the West Australian government. While with the West Australian government, Tim was General Manager (Regulatory and Compliance) at WorkCover WA prior to rejoining the ATO in early 2013. Tim is based in Perth.

Daniel Smedley, CTA, is a Principal of Sladen Legal. He is a Law Institute of Victoria Accredited Specialist in Tax Law and holds a Master of Taxation. Daniel is the principal author of Trust Structures Guide published by The Tax Institute and a regular presenter at industry conferences and workshops. Daniel primarily advises businesses and high net worth individuals in relation to business and investment structuring, trusts, succession planning and taxation law.

Linda Tapiolas, CTA, is a Partner in the Cooper Grace Ward Lawyers Commercial Team. She provides a range of support services to accountants, financial planners and other professional advisers. This includes technical advice on complex tax, CGT, Div 7A issues, and acting on business sales and acquisitions to ensure clients achieve commercial and tax-effective outcomes. Prior to joining Cooper Grace Ward, Linda worked as an accountant for 18

years advising clients on capital gains, business acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions.

Dr Baden U'Ren is Assistant Professor of Entrepreneurship – Bond Business School and Director of the Bond Business Commercialisation Centre. He co-founded the Bond Business Accelerator, a for-credit commercialisation program for student and community start-ups, and conducts an annual Silicon Valley immersion tour. Baden's personal business experience includes running his own fashion wholesale business in the US, capital raising for business acquisitions, managing a pooled investment fund, and working at the inception of QIC's Private Equity program. He is a co-founder of technology start-up Ditterich Agriculture and Pet Wellness Centres, a new veterinary clinic on the Gold Coast. Baden's PhD is in the field of finance, his passion lies in early-stage ventures, and he is a regular commentator, facilitator and mentor in the innovation and start-up ecosystems.

Chris Wyeth, CTA, is a financial adviser with over 20 years practical experience in designing and implementing superannuation strategies and succession planning for SME owners. He also focuses on retirement planning for senior employees in listed companies, government and the universities, and he regularly advises both Australians and expats on managing and transitioning their wealth.



FURTHER INFORMATION

What, when and *how to*

Registration options

Online: taxinstitute.com.au/PBTR
Fax: 07 3225 5222
Mail: The Tax Institute, PO Box 7071
Riverside Centre, Brisbane QLD 4001

Delegate registration inclusions

- Participation in the full technical program
- Online access to technical papers prior to the retreat
- Lunch and refreshment breaks during the retreat on both Thursday and Friday
- Retreat dinner on Thursday night, including pre-dinner drinks, a three-course meal and beverages.

Please note: The registration fee does not include accommodation, hotel incidentals, transfers or delegate folders (see “Printed materials” below).

Early bird registration

All registrations received and paid on or before Monday 3 April 2017 will be entitled to an early bird discount.

The Tax Institute CPD event app

The Tax Institute understands the impact that an event of this nature has on the environment, especially when printing delegate materials. The event app is easy to use and contains program information, materials (technical papers and slides), evaluation forms and more. We encourage all delegates to download the app on their phone or tablet prior to this event. Once the materials are available, an email will be sent to delegates with access details (approximately five days before the event).

Printed materials

Printed materials are not included in your registration. A delegate folder with printed materials (technical papers and slides) can be purchased at a cost of \$100. These must be purchased and paid for in conjunction with your registration. Please note there will be no additional folders available for purchase at the event.

Dress code

Business casual attire is suitable for the daytime sessions and for the Thursday night dinner.

Location

The Palazzo Versace Hotel is located at Main Beach on Queensland's Gold Coast, which is located one hour's drive south of Brisbane or a 40-minute drive north of Gold Coast Airport. At the sophisticated end of the Gold Coast, Main Beach presents an opulent shopping centre, a fabulous marina and the aquatic theme park, Sea World, all on the footsteps of a white, sandy beach.

Venue – The Palazzo Versace Hotel ★ ★ ★ ★ ★
94 Seaword Drive, Main Beach QLD 4217

The Palazzo Versace Hotel provides a waterfront setting, spectacular architecture, extraordinary service and an ambience of pure glamour. The venue provides 5-star meeting facilities, as well as 200 classically appointed hotel rooms including a selection of superior rooms and suites. Breakfast is included in the accommodation room rate for one person and additional breakfasts can be purchased at a cost of \$40 per person, per day.

Wish to extend your stay?

The Palazzo Versace Hotel has kindly extended its exclusive accommodation rates to The Tax Institute's delegates for three days both pre and post the retreat's scheduled dates.

Getting there

Air: Delegates arriving by air should fly into either Brisbane or Gold Coast airports. While Gold Coast is the closest airport to the hotel, not all airlines service this airport.

Parking: There is complimentary parking at The Palazzo Versace Hotel for all delegates.

Retreat dinner

The retreat dinner will be held on Thursday 25 May. The cost of this dinner is included in the registration fee and additional tickets can be purchased for \$165 per person. This includes pre-dinner drinks, a three-course meal and beverages. Please indicate on the registration form if you wish to attend the dinner and if you require additional tickets.

Group discounts

Purchase four full registrations and receive a fifth full registration for FREE. 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 and in the delegate folder (if purchased). Please contact the Queensland office if you do not want your name included on the list.

Confirmation of registration

Confirmation of your registration will be emailed to you upon receipt of your registration fee.

CPD accreditation

Attendance at the retreat counts for 12.5 hours of Professional Development Accreditation with The Tax Institute.

FURTHER INFORMATION

What, when and *how to*

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 retreat. 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. Any accommodation nights booked through The Tax Institute will be non-refundable in the event of cancellation.

Become a member

There is no time like the present to join Australia's premier tax body and take advantage of the special new affiliate member introductory offer of only an additional \$300 on the member registration fee (valid until 30/6/2018). Member benefits include:

- *Taxation in Australia* journal
- *TaxVine* e-newsletter
- TaxLine Research Service – free to members
- CPD event discounts
- Publications and tax product discounts
- Business Alliance Partner discounts.

Enquiries

For further information please contact the Queensland office on:

Tel: 07 3225 5200

Email: qld@taxinstitute.com.au



Embrace your digital tax world



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Instantly access retreat details, scheduling, speaker biographies as well as available technical papers and presentations, with the CPD Event App. Suitable for your web-enabled smartphone or device. Visit taxinstitute.com.au/pbtr for the download link.



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Register and purchase online

Save time. Register online for CPD or purchase dedicated publications, DVDs and more at taxinstitute.com.au.



Visit our blog

Get the latest industry news from the team at The Tax Institute by visiting our blog at taxinstitute.blogspot.com.au.



Scan QR code with your mobile device for more info or to register.

REGISTRATION FORM


Please retain original copy for your records. Please photocopy for additional delegates. All prices quoted include GST.
ABN 45 008 392 372.

PLEASE PRINT IN BLOCK LETTERS.

2017 Private Business Tax Retreat | 25–26 May | The Palazzo Versace Hotel, Gold Coast

Register

 **Online**
Save time, register online
at taxinstitute.com.au/PBTR

 **Mail**
The Tax Institute
PO Box 7071, Riverside Ctr
Brisbane, QLD 4001

 **Email**
qld@taxinstitute.com.au

 **Fax**
07 3225 5222

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Early bird offer

Register on or before Monday 3 April 2017 and save!

Registration options (all prices include GST)

Please see page 9 for registration inclusions.

	Early bird	Full registration
The Tax Institute member	<input type="checkbox"/> \$1,590	<input type="checkbox"/> \$1,795
New-member*	<input type="checkbox"/> \$1,890	<input type="checkbox"/> \$2,095
Non member	<input type="checkbox"/> \$1,990	<input type="checkbox"/> \$2,195

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

☐ Add \$100 to receive printed technical papers and presentations

* New member price entitles you to affiliate membership ending on 30/6/2018.
For more information, please visit www.taxinstitute.com.au/member-centre.

Personal details

Title: (Dr/Mr/Mrs/Miss/Ms/Other)

Member no:

First name:

Last name:

Company:

Postal address:

Suburb:

State:

Postcode:

Tel:

Fax:

Email:

Dietary requirements:

☐ Please tick this box if you do not wish your name to be included on the delegate list provided to all delegates.

Retreat dinner

The retreat dinner is **INCLUDED** in the registration fee for delegates attending the full program.

Thursday 25 May, The Palazzo Versace Hotel

- ☐ 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 \$165 per person

No. x tickets at \$165 each \$

Name(s):

Dietary requirements:

Accommodation

All accommodation bookings are subject to availability and must be paid in full with registration. Accommodation rates are only available through The Tax Institute and are quoted on a per room, per night basis. Rooms are inclusive of one breakfast per room and additional breakfasts can be purchased for \$40 per person, per day. As per booking conditions, all accommodation booked is non-refundable. Delegates are responsible for all incidental charges.

☐ Superior room at \$325 (inclusive of one breakfast per person, per night)

☐ Additional breakfast at \$40 per person, per night No.: _____

No. nights required: Total \$:

Note: There is a range of deluxe suites available upon request – please contact us for a personalised quote. (Discounted group rates are available to delegates for the three days pre and post retreat dates.)

Arrival date: Time:

Departure date: Time:

Occupancy (please circle): King / Double / Non-smoking / Smoking (if available)

Total number of people in room:

Sharing room with:

Accommodation (cont)

Accommodation special requirements (eg cot, extra bed, etc):

Please note that additional charges may be incurred for extra guests, extra beds, use of cots etc which will be charged to the individual room. Accounts are to be settled by delegates on departure. All accommodation booked through The Tax Institute is non-refundable.

Payment details summary

Delegate registration fee	\$
Printed delegate folders (add \$100)	\$
Additional retreat dinner ticket(s) (add \$165 per person)	\$
Accommodation (add \$325 per night)	\$
Additional breakfasts (add \$40 per person per night)	\$
Total payable	\$

Payment method

Full registration total \$

Total payable \$

☐ I enclose a cheque* for \$

*Please make cheque payable to The Tax Institute in Australian dollars.

OR

☐ Please charge my credit card \$

☐ AMEX ☐ Visa ☐ MasterCard ☐ Diners

Card no.

Cardholder's signature:

Cardholder's name:

Expiry date:



THE TAX INSTITUTE



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