

Death & Taxes Conference

11–12 October 2023

The Calile Hotel & Online

12 CPD hours



Welcome

Australia's leading estate taxation and administration conference returns to Brisbane again this year.

With the client bases of many practitioners ageing, the complexities of asset holdings and family arrangements increasing, and the highest ever intergenerational wealth transfers now occurring, practitioners need to invest time in developing an understanding of the taxation of deceased estates.

This continues to be an important market and opportunity for many professionals, but equally one that has seen an unprecedented growth in litigation. It therefore presents risks that practitioners must manage.

The organising committee have worked hard to put together a compelling program that includes current relevant topics for a range of practitioners. This year's technical program will address a range of topical content including family trust elections, BDBNs – responsibility, drafting, other issues, gift & loans in estates, cross-border deceased estates, navigating the digital afterlife plus much more.

Join us in October at the Calile Hotel in Brisbane or online for a two-day expansive technical program with industry experts from across the nation.

This is a must-attend conference for all tax and legal practitioners involved in succession planning and estate administration.

We look forward to seeing you in October again for this wonderful annual event.



Peter Godber, CTA
Chair, Conference Organising Committee

Early bird offer

Register before Friday, 15 September 2023 to save!



Technical program

Day 1 Wednesday, 11 October 2023

Time	Session
8:30 – 9:20am	Registration
9:20 – 9:30am	Welcome and opening address
9:30 – 10:30am	<p>Session 1: Trusts and distributions – Traps and avoiding disasters Speaker: Greg Russo, Greg Russo Law</p> <p>Recently, there has been a rush of cases where deficient trust management has contributed to disputes between beneficiaries and trustees and lead to contested litigation.</p> <p>The good news is that there are many lessons that clients and professional advisors can learn from these cases, on how to avoid traps, and maximise the tax and other benefits that working with trusts can offer.</p> <p>Greg Russo will analyse recent cases, provide practical case studies and examples, and share some of his firsthand experiences, and identify guiding practice principles.</p> <p>In particular this session will look a providing practical guidance on:</p> <ul style="list-style-type: none">• What can go wrong with trust administration, and how tax professionals can avoid trust issues• The professional obligations of advisors for trusts, SMSF and trustee companies; and• Entity record keeping, including resolutions, minutes and variations.
10:30 – 11:00am	Morning tea
11:00am – 12:00pm	<p>Session 2: Family trust elections – Impacts on estates Speaker: Linda Tapiolas, CTA, Cooper Grace Ward Lawyers</p> <p>This session will explore the issues that arise in a deceased estate context when navigating the trust loss rules and determining entitlement to franking credits including:</p> <ul style="list-style-type: none">• When should an estate or a testamentary trust make a family trust election• Passing the family control test• Choice of test individual• Interaction between the estate or testamentary trust and an inter vivos trust that has made a family trust election• Distributions to an estate or testamentary trust• Impact of a test individual dying – who is in and who is out; and• Impact of unpaid entitlements owing to the deceased.

Technical program

Day 1 Wednesday, 11 October 2023 continued

Time	Session
12:00 – 1:00pm	<p>Session 3: Latest administrative issues relating to superannuation funds and death benefit pay outs Speaker: Paul Rafton, BDO, Diana Wong, BDO</p> <p>This session explores the introduction of the new \$3m rule and administration and payment of death benefit payments which accountants and lawyers need to be aware of. This session will cover:</p> <ul style="list-style-type: none">• Introduced \$3m balance rules for taxation of superannuation income – what this means and how fund income and capital gains are anticipated to be taxed from 1 July 2025• Compulsory cashing: superannuation must come out on death. Are there better structures that give more longevity and better estate planning opportunities for the future?• Death benefit planning: who can receive super on death – form and manner and taxation of death benefits• What does the deed say in relation to the payment of death benefits – don't just pay out the death benefits, process is important• Pension payments on death – how to manage the transfer balance cap on death and timing of credits for death benefit and reversionary pensions• Ability to rollover death benefits to another fund; and• New SuperStream reporting and administrative requirements.
1:00 – 2:00pm	Lunch
2:00 – 3:00pm	<p>Session 4: BDBNs – Responsibility, drafting and other issues Speaker: Michael Flynn KC, CTA (Life), Owen Dixon Chambers West</p> <p>This session examines binding nominations in the context of self managed and externally managed super funds and the latest issues in practice. This session will cover:</p> <ul style="list-style-type: none">• Is a super fund's "binding nomination" actually binding at law? Does this differ between self managed and industry funds?• Issues to consider in relation to validity of nominations: sections 58 and 59 of the SIS Act, regulation 6.17A of the SIS Regs and the trust deed If they're not valid, are they not valid directly from the start?• Litigation over paying out to a different party• Latest issues including 3-year lapsing, regulation 6.17A and Hill v Zuda• Externally managed funds and renewing every 3 years for certainty• Can a power of attorney prepare a binding nomination on a member's incapacity• Does a Reversionary pension trump a Binding Nomination• What should pension documents look like? and• Case update: Williams v Williams & Anor [2023] QSC 90.
3:00 – 3:30pm	Afternoon tea

Technical program

Day 1 Wednesday, 11 October 2023 *continued*

Time	Session
3:30–4:30pm	<p>Session 5: The Parent Trap – Gifts and loans in estates Speaker: Bryan Mitchell, FTI, Mitchells Solicitors</p> <p>As Gen X and subsequent generations struggle to get a financial foothold in life, their wealthy baby boomer parents have accumulated a surplus which they are now using to fund their children’s entry into the property market – either by loan or gift, and either during their lifetime or by way of inheritance.</p> <p>How money is transferred has legal ramifications for all parties, and will depend on the nature of the transaction. This session will look at:</p> <ul style="list-style-type: none">• Legal elements of gifts and loans• Examples of loans, inter vivos gifts and gifts in will• What can go wrong• Tips to make it work• Overview of gift and loan back and if it is an effective FPA avoidance strategy; and• Tips on strengthening the gift and loan back strategy.



Technical program

Day 1 Wednesday, 11 October 2023 continued

Time	Session
4:30 – 5:30pm	<p>Session 6: Cautionary tales for Executors Panelists: Michael Flynn KC, CTA (Life), Owen Dixon Chambers West, Bryan Mitchell, FTI, Mitchells Solicitors, Ian Raspin, CTA, BNR Partners Facilitator: Julie Van der Velde, CTA, VdV Legal</p> <p>The panel will discuss the risks attached to the management of deceased estates and how these might be mitigated including issues around:</p> <ul style="list-style-type: none">• The professional advisor acting as executor• Charging clauses• Managing conflicts of interest and of duties• Communicating with Beneficiaries• Risks in seeking commercial outcomes• When and why an LPR might need to seek directions from the court• Adjustments and taking potential tax costs into account• Risks involved in entering into a settlement; and• Should the estate pay all costs.
5:30pm	Networking function



Networking function

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

Date: Wednesday, 11 October

Time: 5.30–7.30pm

Venue: The Calile Hotel

Price: Inclusive for all delegates
\$80.00 each for additional tickets, available to purchase at registration

Dress: Business casual

Technical program

Day 2 Thursday, 12 October 2023

Time	Session
8:30 – 9:45am	<p>Session 7: Cross-border deceased estates – The Australian considerations</p> <p>Speaker: Andrew Smyth, ATI, Robbins Watson</p> <p>Many Australians now own assets abroad, spend time living abroad, and enter into relationships with foreign individuals. Likewise, individuals relocating to Australia often retain assets and holding structures in the country they have moved from. This adds to the complexity faced by executors and their advisors in administering estates, as they are required to consider not only the laws of Australia, but also be attune to the laws of the foreign jurisdiction in administering the estate and collaboration with and advice required in those other jurisdictions.</p> <p>This presentation will take you through some of the more common and complex cross-border tax issues that arise in the administration of deceased estates and offer suggested practical solutions, including in relation to:</p> <ul style="list-style-type: none">• The income of the estate during administration• Specific bequests and residuary entitlements of Australian and foreign beneficiaries and how to manage the differing tax outcomes• The differing outcomes and options available to executors, based on the terms of the will (or the absence of a will)• The maintenance or termination of ‘legacy’ trust and company structures in Australia and abroad, and transitioning ownership and control• Whether FIRB approval is required for transferring property to foreign LPR, beneficiaries and testamentary trusts• The application of section 99B to transfers of funds from offshore estates, testamentary trusts and inter vivos trusts to Australian residents; and• The interplay between the position in Australia and in relevant foreign jurisdictions.
9:45 – 10:45am	<p>Session 8: Estates and philanthropy</p> <p>Speakers: Olivia Clark-Moffatt, Australian Communities Foundation, Frank Hinoporos, CTA, Hall & Wilcox Lawyers</p> <p>Australia is consistently ranked among the top countries around the world for charitable giving, with the majority of Australians making financial donations to charities annually. It is quite common for Australians to provide for charitable bequests in their wills and equally as common for charitable structures established to outlive their founders.</p> <p>The rules and practicalities of philanthropic giving via a deceased estate are not as simple as many would believe, and can create complex tax issues for executors and beneficiaries.</p> <p>This session will consider the following key issues, with reference to real-life examples and practical suggestions to cut through the complexity:</p> <ul style="list-style-type: none">• Entitlements to income of the estate and possible tax ‘leakage’• The application and interaction of the Division 30 gifting rules in of the ITAA 1997, CGT event K3 and section 118-60 DGR exemption• Tax-effective strategies for giving effect to the testator’s intentions• Establishment of charitable trusts and ancillary funds via the terms of the will• Transitioning control and ‘ownership’ of legacy structures• The practicalities of attending to charitable bequests; and• ‘War stories’ – where we have seen simple scenarios turn into complicated issues.

Technical program

Day 2 Thursday, 12 October 2023 continued

Time	Session
10:45 - 11:15am	Morning tea
11:15am - 12:15pm	<p>Session 9: Navigating the digital afterlife – Deceased estates and the challenges of the digital age Speaker: Tracey Dunn, EY</p> <p>The session will explore the increasing impact of the digital age on the administration and taxation of deceased estates and taxation, including:</p> <ul style="list-style-type: none">• Understanding digital assets and their significance in estate planning• Digital assets and cryptocurrency: the identification and distribution of cryptocurrency and digital assets in estate administration• Digital assets and testamentary trusts• Privacy concerns and the administration of deceased estates• Understanding the challenges associated with electronic probate and certification of ‘original’ digital documents• Accessing personal information: password managers, two factor authentication and other barriers to access• Preparing tax returns for a deceased: accessing a deceased person’s tax and superannuation information; and• Remote execution of Wills and the increased challenge to their validity.
12:15 - 1:00pm	<p>Session 10: Other issues in tax administration Speaker: Peter Godber, CTA (Life), Consultant and Co-Chair, National Tax Liaison Group</p> <p>The interaction and experience with the ATO is critical for all tax advisers, tax agents and executors. This session will explore current issues in ATO engagement and hot technical topics, including:</p> <ul style="list-style-type: none">• The importance of digital strategies into the future• Matters subject to public guidance and private rulings• Areas in need of more technical clarification; and• Other hot topics in tax and estates.
1:00 - 2:00pm	Lunch

Technical program

Day 2 Thursday, 12 October 2023 continued

Time	Session
2:00 – 3:00pm	<p>Session 11: Taxing issues when carrying on a business in an estate Speaker: Paul Banister, CTA, Grant Thornton</p> <p>An LPR faces a kaleidoscope of tax issues where the deceased carried on business directly or through structures. This session will delve into a number of scenarios to highlight the dilemmas faced by an LPR including:</p> <ul style="list-style-type: none">• Business continuity and minimising risk• Division 7A loans owed by the deceased• When a company is a beneficiary of the deceased estate; and• Continuing land sales during estate administration including GST implications.
3:00 – 3:30pm	Afternoon tea
3:30 – 4:30pm	<p>Session 12: Cross-border deceased estates – The offshore considerations Speakers: Marsha Dungog, Withers International, Alessia Paoletto, Withers International</p> <p>It is crucial that executors and administrators obtain appropriate advice in relevant offshore jurisdictions, where an estate has offshore LPR, beneficiaries or assets. It is equally important that Australian beneficiaries of offshore deceased estates understand exactly what they are received, from whom, and the associated tax implications here and there.</p> <p>Where there is a foreign element to a matter, advisors need to urge clients to “get foreign tax advice” as early as possible, so that decisions are made in full knowledge of all risks and options. This session will discuss some of the common issues that arise in key offshore jurisdictions, with practical examples, so that advisors can spot and flag these issues and encourage clients to seek complementary offshore tax advice. Such early advice is necessary to discharge the advisor’s own professional obligations as well as deliver high customer satisfaction.</p>
4:30pm	Conference close

Presenters

Paul Banister, CTA, is a Chartered Accountant, a Partner at Grant Thornton and is Queensland's representative on The Tax Institute's National Council. He has over 35 years' experience working with clients to help them navigate through complex and potentially risky tax and commercial issues. His expertise includes domestic and international tax planning, transaction advisory and support, expert witness reports, succession planning and estate planning. Paul has presented at many professional and business forums, both in Australia and internationally. He is a contributing author to Thomson Reuter's Financial Planning Handbook. Paul is also the recipient of The Tax Institute's SME Tax Adviser of the Year Award for 2016.

Olivia Clark-Moffatt has had thirty years of work experience, which is diverse and has ranged over a number of sectors. Previous roles include ITC consultant, operations manager of an advertising agency, Anglican priest, founder of an alternative health social enterprise, executive in a large NFP delivering age and community care and principal of an entrepreneurial services consultancy. Olivia holds Bachelor degrees in Science (Uni. Melb), Theology and Ministry (Aust. College of Ministry) and is a graduate of the Arrow Leadership program, Melbourne Business School General Management Course, AICD Directorship

Course, and has served on numerous for-purpose boards

Marsha Dungog is a partner in the private client and tax team and is the Office Managing Director of the San Francisco Office. Marsha provides US international income, trusts and estate tax planning for high net worth individuals, and family businesses based in the US and abroad with respect to their cross-border assets, investments and activities. She also advises trustees, executors and fiduciaries as well as financial, tax and legal advisors on international tax exposures and reporting obligations for beneficiaries and heirs of trusts and estates with US connections. Marsha's practice includes US tax planning for foreign investors, founders and entrepreneurs deriving income from US-based sources and operations, as well as tax advisory services for foreign legal, financial and tax advisors on the US taxation of foreign pensions and retirement arrangements, US-based investments and exit strategies for corporate executives, global employees and US persons living abroad. She is an author and frequent speaker on international tax issues.

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.

Michael Flynn KC, CTA (Life), is a Barrister at Owen Dixon Chambers West, specialising in taxation, and was National President of The Tax Institute in 2014. He is the author, with Miranda Stewart, of *Death and Taxes* (7th edition, 2022). Michael has appeared in the Administrative Appeals Tribunal, the Federal Court and the High Court in taxation cases. Michael has been a member of various committees of The Tax Institute for over 20 years.

Peter Godber, CTA (Life), has over 35 years experience in giving professional taxation advice and dealing with change to Australian tax laws. Peter provides advice in many areas of taxation, including business taxation, business and investment structuring, international tax

planning, prudential tax audits and tax risk management.

Frank Hinoporos, CTA, is a Partner in the Tax group at Hall & Wilcox. Frank has a particular focus on domestic and international tax for individuals and private groups, including the complex issues tax issues arising from international succession planning. His clients include SMEs, high net worth individuals and families and not-for-profit entities. Frank is a member of the Law Institute of Victoria, a Chartered Tax Adviser with The Tax Institute, a Fellow of the Governance Institute of Australia and a member of the Society of Trust and Estate Practitioners (STEP).

Bryan Mitchell, FTI, is the managing director of Mitchells Solicitors. He is an Accredited Specialist in Succession Law and a full member of the Society of Trust & Estate Practitioners ("STEP"). Bryan & his firm are recognised leaders in Estate Planning and Estate Litigation in Australia. His practice works almost exclusively in the areas of Wills, Estates, Trusts & Elder Law. Bryan is a regular presenter. He is the recipient of the STEP Australia Masters Award 2023; immediate past Chair of STEP Australia; former Chair of STEP Queensland; Deputy Chair for the Queensland Law Society ("QLS") Succession Law Policy Committee; Deputy Chair of

Presenters

the QLS Succession Law Specialist Accreditation Advisory Committee; and member of the University of Queensland Law School Advisory Board.

Paul Rafton is a superannuation partner with BDO in Brisbane. Paul is a specialist in Self-Managed Superannuation Funds (SMSF), advising clients on compliance issues and techniques to enhance and protect their retirement savings. He has worked across superannuation fund compliance and administration and provides advice on the interpretation of related legislation. Paul joined BDO, as executive director, in 2006. In 2014, he was appointed partner. Paul has over 27 years' experience in accounting and superannuation fund compliance and administration.

Ian Raspin, CTA, is the Managing Director of BNR Partners and has specialised in the taxation of deceased estates since 2000. He commenced his career in public practice in Tasmania working predominantly with SME's, prior to 'migrating' to Australia in 1998 and commencing his career with BNR Partners. Ian is a current sitting member of CPA Australia Taxation Centre of Excellence, and the Chair of the Society of Trust and Estate Practitioners Australia Limited. He also sits on the Planning Advisory Committee for the College of Law.

Greg Russo has almost 30 years' experience in succession planning, administration and litigation and is one of Victoria's most experienced and respected succession law solicitors. With a background in pure mathematics, Greg not only understands the implications of planning decisions on future taxation, SMSF, trust and estate administration, he is also able to break down complex concepts and structures logically and explain options to clients in a way that empowers them to take positive action and ownership for their decisions. Greg is an LIV Wills & Estates Accredited Specialist, a chairperson of the LIV Specialist Accreditation Education Advisory Committee, a board member of the Mount Eliza Community Bank, a member of STEP, and is recognised in Doyle's Guide, in Victoria, as a Leading Wills and Estates Litigation Lawyer and a Leading Wills, Estates and Succession Planning Lawyer.

Andrew Smyth, ATI, is the managing partner of Robbins Watson and runs the Estate Planning section of the firm. With over 30 years' experience working in and managing business, Andrew is sought after by industry and commerce for his specialist knowledge in structuring, regulatory compliance, business succession planning and SMSFs. Andrew is a regular presenter at legal and accounting industry seminars

on legal topics of current interest and importance, and is an author of the Australian reference text "Estate Planning" published by LexisNexis.

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

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acquisitions and restructuring. She also conducted seminars and training sessions on various topics including CGT small business concessions.

Julie Van der Velde, CTA, is the principal of a specialised commercial law firm, VdV Legal, and has degrees in Business and in Law and a Masters of Taxation Law. With over 25 years' experience advising Australian businesses, her practice focuses on taxation and trust law with an emphasis on business structuring, tax planning, business succession and intergenerational transfers. Julie is The Tax Institute's SME Chartered Tax Adviser for 2017 and is regularly listed as a recommended tax lawyer and a recommended Wills, Estates and Succession Planning lawyer in Doyle's Guide.

Diana Wong is a superannuation manager with BDO in Brisbane. Diana specialises in Self-Managed Superannuation Funds (SMSF), advising clients on compliance issues and techniques to enhance and protect their retirement savings. She has over 6 years' experience in accounting and Superannuation Fund compliance and administration. Diana has a proven track record of reliability and expertise and has helped many clients get their outstanding tax lodgements in order, and liaise with the ATO via enforceable undertakings, to achieve the best outcomes possible.

Venue and accommodation



The Calile Hotel

48 James Street, Fortitude Valley, QLD 4006

Located in the city of Brisbane, with direct access to restaurants, shopping and bars, The Calile Hotel features an outdoor pool, fitness centre and spa facilities. You can complete your Brisbane experience with visits to the city's art galleries, museums and the CBD, all within a short drive from the property.

Create memorable moments in time at The Calile Hotel. Enjoy the many facilities at the property, including the four on site restaurants Lobby Bar, Hellenika, SK Steak & Oyster and Sushi Room. Relax with a cocktail in a poolside cabana or at the hotel's spa facilities, which provide a holistic wellness experience with modern approaches to skin health, medical aesthetics and beauty essentials.

*Favourable room rates have been negotiated, book your accommodation [here](#) and use the code **TTI111023**.

Getting to The Calile Hotel

The Calile Hotel is located at 48 James Street, Fortitude Valley and is approximately a 20 minute drive from the Brisbane Airport. The hotel is located a short ten-minute walk from the Fortitude Valley Train Station and is directly adjacent of the James Street 8A bus stop.

The Calile Hotel has secure carparking available from 6:00am-12:00am for \$25 per day valet parking is also available for a cost of \$45 per day from 6:00am-12:00am.

* Subject to availability



Event information

Networking function | Wednesday, 11 October 2023

The networking function on the close of day 1 is included in the registration fee for delegates attending the full conference. The networking function includes stand-up canapes and drinks.

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 (CPD)

Attendance at the conference counts for 12 hours of CPD 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, live virtual sessions 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.

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 to an online format to deliver the event. If there is a difference in price, a credit will be provided to delegates to be used at a future event.

If a registered delegate is unable to attend as a result of a diagnosis of COVID-19 or they are experiencing symptoms of COVID-19, a full refund will be offered with the provision that a medical certificate is produced explaining the diagnosis or a summary of the appropriate action to be taken i.e. a COVID-19 test and medical advice.

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.

Registration

Registration inclusions

	Online access to presentations and technical papers	Morning/afternoon tea/lunches	Networking function*
Full registration This registration option entitles one delegate to attend the entire event.	✓✓✓	✓✓✓	✓✓✓
Online full registration This registration option entitles one delegate to attend the entire event virtually.	✓✓✓		

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

Discounts

Early bird registration

All registrations received and paid on or before Friday, 15 September 2023 will be entitled to an early bird discount.

Group discounts

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

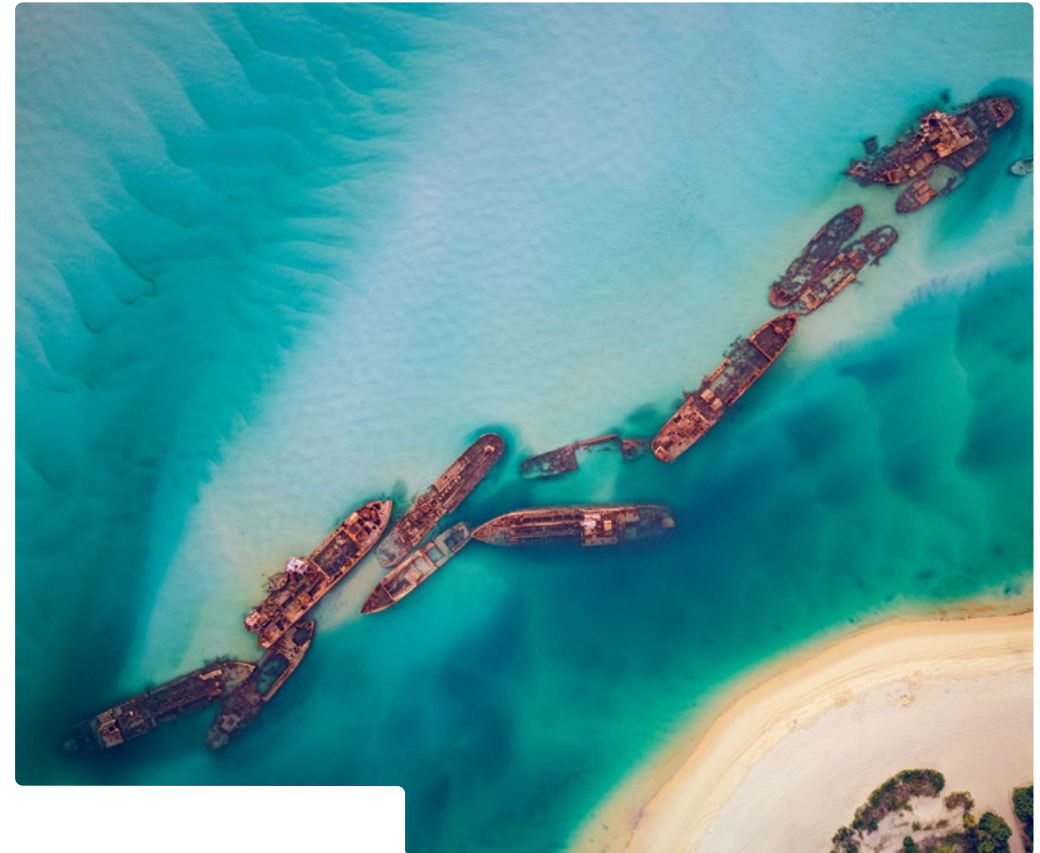
This offer cannot be redeemed in conjunction with any other promotional offer or code. All attendees must be from the same firm and all registration forms must be submitted together. For further information please contact the national events team on 1300 829 338 or nationalevents@taxinstitute.com.au.

Register now!



Register online ▶

Register via form ▶
included in this brochure



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 – 12 CPD hours

	Member	New member*	Non-member
Early bird registration Received on or before Friday, 15 September 2023	<input type="checkbox"/> \$1,700	<input type="checkbox"/> \$2,070	<input type="checkbox"/> \$2,000
Standard registration Received after Friday, 15 September 2023	<input type="checkbox"/> \$1,900	<input type="checkbox"/> \$2,270	<input type="checkbox"/> \$2,200

Online registration – 12 CPD hours

	Member	New member*	Non-member
Standard registration Received after Friday, 15 September 2023	<input type="checkbox"/> \$1,900	<input type="checkbox"/> \$2,270	<input type="checkbox"/> \$2,200

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

Networking function

The networking function is INCLUDED in the registration fee for delegates attending the full conference.

Wednesday: 11 October 2023 – The Calile Hotel

- Yes, I WILL be attending the networking function OR
 No, I WILL NOT be attending the networking function
 Yes, I require additional tickets for the networking function at \$80 per person

No. x tickets at \$80 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 to:

- save \$215 off Affiliate membership to 30 June 2024
- access to member-only prices to this and future events
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Find out more about membership at 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:

JOIN TODAY

3 Payment summary

Registration fees

\$

Additional guest tickets – networking function (\$80 each)

\$

Total payable

\$

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

Peter Godber, CTA (Life), Chair, Death & Taxes Conference Organising Committee

Todd Bromwich, Hall & Wilcox

Linda Farmer, CTA, Tax LF

Spyros Kotsopoulos, CTA, Deloitte

Katerina Peiros, ATI, Hartwell Legal

Ann Janssen, ATI, Estate First

Julie Van der Velde, CTA, VdV Legal





Nathan Yii, CTA, Nathan Yii Lawyers

Yikai Hoe, CTA, Provident Lawyers





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