

 **The *Tax*
Summit**

11–13 September 2024

ICC Sydney

20 CPD hours

Frame the future

Program at a glance

 **The Tax Institute**

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Welcome Reception



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Frame the Future at **The Tax Summit**



The future is what we make it.

From policy to professional standards,
AI technology, to how we stay connected in
the workplace, the face of the future is up to us.

This September we will be returning to the International Convention Centre as host venue of our must-attend annual event, The Tax Summit.

This 3-day experience is a unique opportunity to connect in-person with fellow practitioners and explore perspectives from around the world of tax. With sessions on corporate, professional practice, legal, technical, SME, domestic and international topics, the program embraces the wide and varied experiences of tax professionals. We investigate developments, impacts and ideas in these spaces with clear eyes and forward thinking.

☐ + ☐ Come along and be part of the excitement as we shape tomorrow.

Full Program coming soon!

[Register now ▶](#)

Highlights

80+

speakers

50+

sessions

20

CPD hours

3

days

Connect

Network with peers
from the profession

Learn

Hear from the latest
tax thought leaders

Shape

Contribute to the direction
of tax in Australia

The Tax Summit ▪ 11–13 September 2024

Day 1 ▪ Wednesday 11 September

8:00–8:30am	Registration			
8:30–9:00am	Session 1: Official Welcome and opening address: Todd Want, CTA, President, The Tax Institute			
9:00–10:00am	Session 2: Justice Hill Memorial Lecture			
10:00–10:30am	Morning tea			
	SME	Unknown Unknowns	Emerging Leaders	Corporate
10:30–11:30am	Session 3.1 Legacy or evolution – Managing structures across generations	Session 3.2 A deep dive into five regularly overlooked Family Trust Election Issues	Session 3.3 International tax issues	Session 3.4 ATO update
11:30am–12:30pm	Session 4.1 Does your client have legal capacity?	Session 4.2 Keeping the client on life support while dealing with the ATO's intensified debt collection activity	Session 4.3 Trusts – Holistic level	Session 4.4 BEPS – The latest perspectives
12:30–1:30pm	Lunch			
	SME	Tax Disputes	Emerging Leaders	Corporate
1:30–2:30pm	Session 5.1 How to make heads and tails of recent cases on trust distributions	Session 5.2 Navigating an ATO review or audit – The potentially long and windy road ahead	Session 5.3 Division 7A – The basics	Session 5.4 Approaching Pillar 2 implementation – What you need to know
2:30–3:00pm	Afternoon tea			
3:00–4:00pm	Session 6.1 What's on our radar	Session 6.2 Give me instructions that fit the facts – Will the issue collapse at the AAT?	Session 6.3 Timing and CGT	Session 6.4 The latest developments on the Thin Capitalisation legislation
4:00–5:30pm	Session 7: Q&A panel – Being future fit – What it means and what to prepare for			
5:30–7:30pm	Welcome Reception , Champagne Bar, Sofitel Darling Harbour			

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Day 2 ■ Thursday 12 September

8:30–9:15am	Session 8: Framing the future of tax and the tax profession			
9:15–10:00am	Session 9: Commissioner’s address, Rob Heferen, Commissioner of Taxation, Australian Taxation Office			
10:00–10:30am	Morning tea			
	SME	Property	Hot Topics	Corporate
10:30–11:30am	Session 10.1 Complexities in dealing with “Pre-CGT assets”	Session 10.2 Tips and traps for assembling the documentation required for land transactions	Session 10.3 The evolution of corporate structures	Session 10.4 Software ruling and practical implications
11:30am–12:30pm	Session 11.1 Rollovers – Practical strategy and compliance insights	Session 11.2 Aging patriarchs are unravelling trust holdings	Session 11.3 Case update	Session 11.4 Public CBCR – EU requirements and how the Australian legislation is looking
12:30–2:00pm	Session 12: Technical session and lunch			
2:00–3:00pm	Session 13.1 The cutting edge of small business CGT concessions – Planning and traps	Session 13.2 In life or at death – “When your client stops calling Australia home”	Session 13.3 The TPB and professional obligations – Panel session	Session 13.4 Heads of Tax panel
3:00–3:30pm	Afternoon tea			
3:30–4:30pm	Session 14.1 PSI vs PSB and the PCG – Where do you fit?	Session 14.2 Examining five regularly encountered but less common CGT events	Session 14.3 Debt deduction creation rules	Session 14.4 Pro-active strategies to manage your transfer pricing, Part IVA and intangibles risk
	SME	Ethics	Hot Topics	Corporate
4:30–5:30pm	Session 15.1 The accidental SGE advisor	Session 15.2 When Len & Lani, each with their own RTA, venture separate holdings to a single development	Session 15.3 Are you audit ready?	Session 15.4 The future of franking credits
5.30pm	Delegate free time			
7.00pm	Tax Summit Gala Dinner			

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Day 3 ▪ Friday 13 September 2024

8:30–9:30am	Session 16: VIP presentation			
	SME	Ethics	Hot Topics	Corporate
9:30–10:30am	Session 17.1 Employee equity incentive arrangements – Getting them right	Session 17.2 What is the risk of taking on a new client – Dealing with blunders in earlier years	Session 17.3 Is the rulings regime fit for purpose in 2024?	Session 17.4 A recent look at the application of Treaties
10:30–11:00am	Morning tea			
	SME	Cyber	Hot Topics	Corporate
11:00–12:00pm	Session 18.1 Is super still a good investment fit for retirement?	Session 18.2 Crypto issues – They lost money but there is assessable income to report	Session 18.3 Advising on shifting sands	Session 18.4 Deep dive into the derivation of income
12:00–1:00pm	Session 19.1 Demystifying Division 7A – Common misunderstanding and challenges	Session 19.2 Are you being hacked – Will you even know?	Session 19.3 Part IVA and evidence	Session 19.4 Reportable tax positions – Where are we now?
1:00–2:30pm	Session 20: Closing keynote – Seated lunch			

Frame the Future at The Tax Summit

See you in Sydney

Sydney is a global city and an ideal place to come together at The Tax Summit. It's stunning harbourside setting, impressive venues and world class cuisine make it the perfect setting for The Tax Summit in 2024.

Situated in Sydney's academic, cultural and technology precincts, ICC Sydney offers convenient access to Australia's most cosmopolitan city. A major financial hub in the Asia Pacific region, it's home to 43 local and foreign-owned banks, over 600 multinational firms, and Australia's largest Professional Services, FinTech and Technology industries.

Accommodation

Favourable room rates have been negotiated and secured at various accommodation options around Sydney. You can view accommodation options and book below:

[Book your accommodation ▶](#)

We can't wait to see you there.

[Register now ▶](#)

Contact us

1300 829 338

nationalevents@taxinstitute.com.au



Thank you

The Tax Institute gratefully acknowledges the generous assistance of members of The Tax Summit Organising Committee and The Tax Summit Program Committee.

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