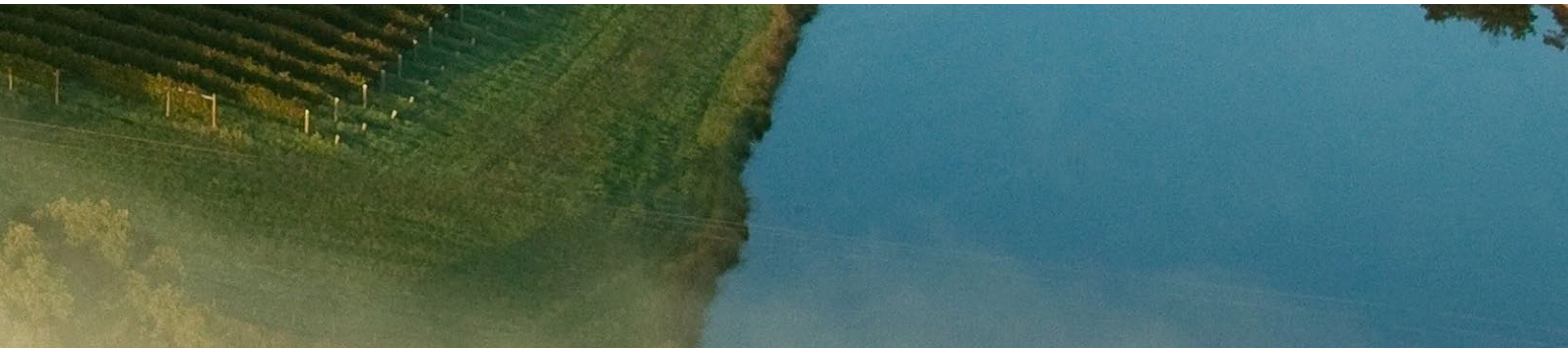
THE TAX INSTITUTE

2021 Yarra Valley Tax Retreat

26–27 July 2021 | RACV Healesville Country Club & Resort, Yarra Valley

12 CPD hours



Welcome

2021 finally rewards us with an opportunity to reconnect. Unwind and take in all the idyllic Yarra Valley has to offer while connecting with industry-leading experts on a range of hot topics for SMEs and private clients.

Amidst growing optimism for an economic recovery in 2021 and the disruption of 2020 behind us, we are pleased to invite you to the inaugural Yarra Valley Tax Retreat. This 2-day residential-style retreat will be held at the stunning RACV Healesville Country Club & Resort in the Yarra Valley and offers a packed program of practical insight and thought leadership. Highlights include:

- Dr Julianne Jaques QC, CTA and Frank Hinoporos, CTA of Hall & Willcox taking us through the latest issues in tax residency
- The Tax Institute's Senior Advocate, Robyn Jacobson, CTA and Neil Brydges, CTA of Sladen Legal covering a raft of recent developments in property
- Paul Hockridge, CTA of Mutual Trust exploring the tax consequences of new working arrangements in the post-COVID world

The current issues being encountered by tax practitioners are truly unique. Connecting with your peers is a fantastic opportunity to share experiences whilst helping ensure you are best equipped to navigate the year ahead. The impact of the COVID-19 pandemic has been polarising for our clients. Whilst many continue to face uncertainty and ongoing financial stress as some industries remain heavily subdued, others are enjoying remarkable success and looking to expand. Combined with an unwinding of government support, many practitioners are finding significant demand for their services. With this in mind, we have prepared a new style of program for Victoria incorporating a number of face-to-face workshops in order to explore current topical issues in a series of practical case studies.

On the theme of unwinding, the resort has a full range of activities to keep you entertained, including a full 18-hole golf course and onsite spa, our not-to-be-missed Retreat dinner on Thursday night, and a showcasing of local products. In addition, why not take advantage of your time in the Yarra Valley, and support local businesses, by visiting some of the many other amazing offerings in the area, before or after the Retreat.

Places are limited. Please register early to guarantee your spot at this highly anticipated event. I look forward to seeing you there.

Aaron Fitchett, CTA
Chair, 2021 Yarra Valley Tax Retreat Organising Committee

Thank you

The Tax Institute gratefully acknowledges the generous assistance of the 2021 Yarra Valley Tax Retreat Organising Committee:

Aaron Fitchett, CTA, Baumgartners (Chair, 2021 Yarra Valley Tax Retreat Organising Committee)

Daniel Angelovich, PWS Advisory

Neil Brydges, CTA, Sladen Legal

Mark Gioskos, FTI, Thomson Geer Lawyers

Stuart Glasgow, CTA, HID Accountants

Fiona Knight, CTA, Australian Taxation Office

Joanne Lugg, FTI

Andrew O'Bryan, CTA, Hall & Wilcox Lawyers

Natalie Quah, FTI, PKF Melbourne

Early bird offer

Register on or before Friday, 7 May 2021 to save!

Technical program

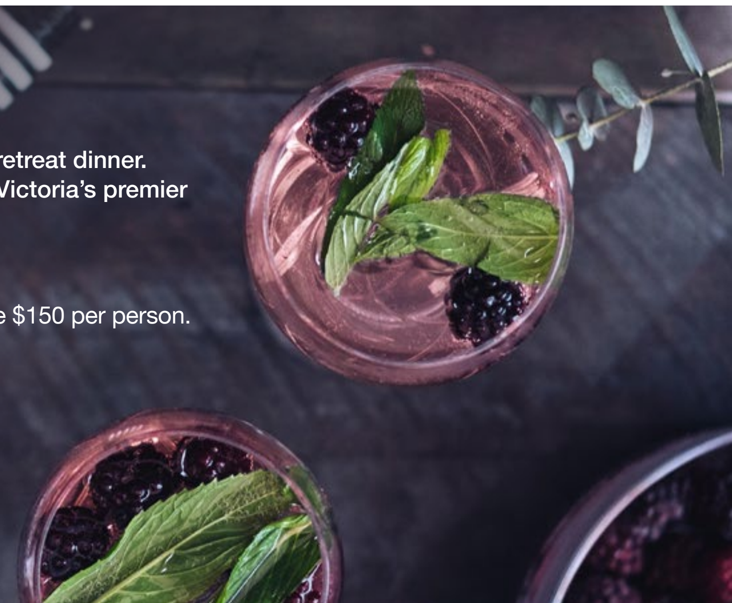
Day 1 – Monday, 26 July 2021

Time	Session	Presenter
9:00 – 9:25am	**Registration**	
9:25 – 9:30am	**Welcome and opening address**	**Fiona Knight, CTA** Victorian State Council Chair
9:30 – 10:30am	**Session 1: Consequences of mobility on the family group** The increased global mobility of individuals and online transactions, together with the deregulation of financial markets and exchange controls since the 1980s, mean that determining the taxation consequences for those entities (and their family groups) requires determining residence (and ensuring there is not an inadvertent change of residency). This session will look at: — The current state of play on residency, both corporate and individual including: – The effect of the *Bywater* decision on corporate residency, the ATO's views on that decision, the Board of Tax review and the government's response – Recent cases concerning individual residency, together with the Board of Tax review – Identifying issues arising from the COVID-19 pandemic and ATO measures to deal with this — Current residency issues affecting SMEs including: – Business migrants to Australia and the issues surrounding the CFC and attributable income provisions – Tips and traps when departing Australia including CGT Event I1, SMSF and compliance status, s 98(3) – Unplanned changes in residency: how they can arise and issues they present, including Australian executors and changing visas — Risk management including: – Planning ahead – Managing mistakes	**Dr. Julianne Jaques QC, CTA** Victorian Bar **Frank Hinoporos, CTA** Hall & Wilcox Lawyers
10:30 – 11:00am	**Morning tea**	
11:00am–12:00pm	**Session 2: All abroad: Managing tax consequences involved in operating offshore** As international business becomes commonplace, it is more important than ever for advisers and clients to be across the tax risks, opportunities, and complexities of operating cross-border. This session will explore the Australian tax considerations associated with a business expanding offshore including the establishment of operating structures, related party agreements, governance protocols and profit repatriation and recent COVID-19 impacts.	**Suzanne Bushell** Pitcher Partners
12:00–1:00pm	**Workshop 1: Mobility case studies** This workshop will provide practical examples of the tax challenges faced by advisers arising from the increased international mobility of their clients, their client's families, and their client's businesses. The case studies will follow the journey of a local wine producer and their families, drawing and building on some of the issues presented in sessions 1 and 2 and covering key topics such as: — The difficulties of determining tax residency of individuals, companies, trusts and SMSFs — The implications of changing tax residency — The operation of dual residency and the "Tie Breaker" provisions in Australia's tax treaties — Expanding business operations globally and the areas to be considered — Implications of bringing funds onshore	**Workshop Leader:** **Daniel Angelovich** PWS Advisory **Workshop Facilitators:** **Glendon Coote, FTI** Australian Taxation Office **Liam Cox** Australian Taxation Office **James Den** HWL Ebsworth Lawyers **Tim Kelleher, CTA** DFK Benjamin King Money **Andrew Wright** Maddocks

Technical program continued

Day 1 – Monday, 26 July 2021 continued

Time	Session	Presenter
1:00–2:00pm	Lunch	
2:00–3:00pm	**Session 3: Restructuring to protect against financial stress** The COVID pandemic has put the spotlight squarely on the viability of businesses operating within certain industries. Many of the strategies for the successful protection of wealth are only effective when undertaken before a business finds itself in financial stress. Advising clients on these matters is a critical part of the modern practitioner's toolkit as tax is usually a significant consideration when undertaking any wealth protection strategies. This session will explore a number of key strategies, including: — Restructuring to move assets from at-risk entities — Restructuring to move business operations from an asset-rich entity — Insertion of holding companies / entities to an existing structure — Trust gift/loan-back arrangements	**Chris Wookey, CTA** Chris Wookey Chartered Accountant
3:00–3:30pm	Afternoon tea	
3:30–4:30pm	**Session 4: I am in financial stress – What to do now?** An initial conversation with an insolvency practitioner is not always bad news or leads to an insolvency appointment. Rather the conversation can be informative, offering insights as to the formal and informal insolvency options available, whilst also helping guide people through the period when crucial decisions are having to be made. So when is the right time to reach out to an insolvency practitioner for an initial conversation. The session will also explore the practicalities, including the timing of the conversation and an application of the technical concepts discussed in the presentation.	**Scott Andersen** Worrells Solvency & Forensic Accountants
4:30–5:30pm	**Workshop 2: Financial stress/insolvency case studies** This workshop will walk through a case-study of a business in financial stress, exploring some of the practical and timing issues, and decisions to be made by the stakeholders, in these circumstances. The workshop will focus primarily on insolvency aspects, drawing from and expanding upon the issues presented in Session 4.	**Workshop Leader:** **Scott Andersen** Worrells Solvency & Forensic Accountants **Workshop Facilitators:** **James Leslie-Watt** de Jonge Read **Ashley Shield** de Jonge Read **Petr Vrsecky** PKF Melbourne
5:30–6:30pm	Delegate free time	
6:30–10:00pm	Yarra Valley showcase and retreat dinner	



Yarra Valley showcase and retreat dinner

Join your colleagues, peers, and our esteemed presenters for the retreat dinner. Keep toasty by the fire, enjoy divine wine and delicious food from Victoria's premier wine region.

Time: 6:30–10:00pm
Price: Included for full registration delegates. Additional tickets are $150 per person.
Dress: Business casual
Venue: RACV Healesville Country Club & Resort

Technical program continued

Day 2 – Tuesday, 27 July 2021

Time	Session	Presenter
8:30–9:30am	**Session 5: FBT and tax consequences of new working arrangements** The COVID pandemic has resulted in a significant number of employees transitioning to working-from-home arrangements. While many employers continue to grapple with the issue of how permanent or temporary these new arrangements are, there are many important tax considerations for advisers to be aware of. This session will cover: — FBT fundamentals – the rates and dates — What has changed and what the Commissioner has had to say on FBT — FBT answers that we are still waiting on — Victorian Payroll Tax in the COVID era — Working from home deductions – the Commissioner's views — Travelling from home (your usual place of work)	**Paul Hockridge, CTA** Mutual Trust
9:30–10:30am	**Session 6: Latest legislative developments in property** There have been several significant changes to the tax law which affect property ownership. This session will guide you through the new rules and will consider: — The vacant land measures which deny deductions for holding costs — The impact of these changes on property developers — The amendments which deny the CGT main residence exemption to foreign residents — Strategies to mitigate the effect of these changes, including understanding the available exemptions	**Neil Brydges, CTA** Sladen Legal **Robyn Jacobson, CTA** The Tax Institute
10:30–11:00am	**Morning tea**	
11:00am–12:00pm	**Session 7: Small scale property development** As greater numbers of people are undertaking small scale renovation, building and land subdivision projects, the tax consequences have increasingly become a focus area of the ATO and a source of uncertainty for clients and advisers. This session will cover a number of key tax implications involved with small scale property developments including: — When is a transaction on the capital or revenue account? — What is a 'mere realisation' and how do the CGT rules apply? — When is someone carrying on a business of property development? — How does the taxation treatment on revenue account differ between a one-off property making scheme versus a property development business? — Is there such thing as an optimum structure for property development? — Do SMSFs have a role to play in property development?	**Rajan Verma, FTI** Velocity Legal
12:00–1:00pm	**Session 8: What happens where the intended use of property changes?** Real estate has traditionally been an accessible and versatile investment for SMEs and high net worth individuals. As investors chase a better return in the market, there is a greater interest in property development from a smaller scale to much larger projects and this may differ from the original intended use. Given the greater transparency of information available to the ATO and the increased focus on property transactions, it is more likely that incorrect tax treatments will cause issues that need to be addressed. Practitioners and advisers are often asked to advise taxpayers on the taxation implications arising from a change in the intended use of their property over the ownership period. This session explores both the direct and indirect tax consequences arising from the change of intention, including: — Income tax consequences arising from a change of purpose: starting and ceasing to hold property as trading stock or on revenue account as part of an isolated profit making undertaking — CGT outcomes when the intended use changes — GST consequences, adjustments and applicability of the GST Margin Scheme — When does a property development enterprise commence and why this is important	**Rachel O'Donnell, CTA** Hall & Wilcox Lawyers **Adam Dimac** Hall & Wilcox Lawyers

Technical program continued

Day 2 – Tuesday, 27 July 2021 continued

Time	Session	Presenter
1:00–2:00pm	**Lunch**	
2:00–4:00pm	**Workshop 3: Property case studies** Tax practitioners are increasingly being asked to create strategies for property developments, whether through renovation, building or land subdivision projects. In order to do this effectively, practitioners must have the knowledge and skills to provide advice in an increasingly complex landscape of tax rules and frequent legislative changes. This workshop will draw on the issues presented in Sessions 6, 7 and 8, and will involve working through practical case studies in relation to real property developments, the use of property and what happens when that changes over time, as well as the income tax, CGT and GST rules that may apply in those contexts. Each workshop group will be guided by a leading tax lawyer and accountant, who together will bring a range of skill and experience to help delegates to navigate the case studies, and to explore any hidden tips and traps from both legal and accounting perspectives.	**Workshop Leader:** **Mark Gioskos, FTI** Thomson Geer Lawyers **Workshop Facilitators:** **Arthur Athanasiou, CTA (Life)** Thomson Geer Lawyers **Mark Macrae, CTA** Arnold Bloch Leibler **Mark Morris, FTI** Morris and Associates **Adrian Zuccarini, FTI** Australian Taxation Office
4:00pm	**Closing address and networking drinks**	

Presenter profiles

Scott Andersen has for 15 years immersed himself in niche accounting practice, insolvency and forensic accounting. Starting as a graduate at an international mid-tier firm, he provided client accounting and auditing services which evolved into practicing in offshore financial centres in Cayman Islands, British Virgin Islands and Guernsey. There he gained experience in complex cross-border solvency proceedings, forensic accounting and asset tracing investigations. In 2015, he spearheaded the opening of the Worrells Geelong office to deliver insolvency solutions to advisers and their clients in the City of Greater Geelong, Bellarine Peninsula, Victorian Surf Coast, Colac and surrounding areas. Scott works to deliver the best possible outcome for clients and stakeholders in a range of industries, including building and construction, agriculture, primary production, transport, manufacturing, finance and retail.

Neil Brydges, CTA, is a Principal Lawyer in Sladen Legal's Tax group. Neil practises in all areas of direct and indirect tax, with a particular focus on the taxation of trusts, corporate tax, M&A and Div 7A. Neil has also advised extensively on cross-border taxation issues and the GST implications of transactions and dealings in the development of property. Using his technical tax knowledge, Neil works with clients to obtain commercial and practical outcomes. He has particular experience in dealing with the ATO on complex tax issues in a dispute resolution context. Neil is a keen and active member of the tax community. As well as presenting on tax topics at various sessions, he has authored and co-authored several published articles, papers and bulletins. Neil is an Accredited Specialist in Taxation Law and Chair of the Tax & Revenue Law Committee with the Law Institute of Victoria, a member of the Tax Committee of the Law Council of Australia, and a Chartered Tax Adviser and member of the SME, Dispute Resolution and GST Technical Committees with The Tax Institute.

Suzanne Bushell is an International Tax Manager with Pitcher Partners. She has worked with the company for several years, providing international tax advice to high wealth individuals, businesses and private groups. Suzanne has assisted numerous clients in successfully navigating the tax complexities associated with their cross-border expansions and managing their associated tax obligations.

Adam Dimac is an experienced tax lawyer, and advises clients on a range of matters including tax planning and structuring, Division 7A, the small business CGT concessions, corporate restructuring, professional firm structures, trust taxation, the taxation of settlements and cryptocurrency taxation. Adam regularly acts for taxpayers in dispute and controversy matters, and provides assistance with ATO reviews and audits. His clients include private groups, professional firms, small-to-medium enterprises, high-net-worth individuals and family groups.

Frank Hinoporos, CTA, is a Partner in the Tax group at Hall & Wilcox Lawyers. 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 and a Chartered Tax Adviser with The Tax Institute.

Paul Hockridge, CTA, is Tax Advisory Partner at Mutual Trust, Australia's leading multi-family office. He has worked for the ATO, a large law firm, has been a partner in medium and Big 4 chartered accounting firms and has over 30 years' experience in tax, asset protection, estate and succession planning. Paul's areas of specialisation include litigation support, property development and FBT and salary packaging. Paul specialises in advising high wealth families and closely held businesses, as well as providing support for a number of accounting and law firms. Paul maintains a practicing certificate as a legal practitioner in Victoria, is a fellow of Chartered Accountants Australian and New Zealand, is senior fellow and teaches in the Masters program in the Law School at the University of Melbourne and is a Chartered Tax Adviser. He sits on The Tax Institute's FBT and Employment Taxes Committee and contributes to The Tax Institute's publication, Estate and Business Succession Planning. Paul sat on the FBT subcommittee of the National Tax Liaison Group for approximately 15 years and was the original author of The A-Z of Benefits and Expense Payments. Paul is best known as a regular presenter at local, State and National Tax Institute conferences.

Robyn Jacobson, CTA, is the Senior Advocate at The Tax Institute. She has nearly three decades in the profession, including a public practice background which preceded her various training roles over 23 years. Robyn continues to be a regular conference and webinar presenter, and is an avid advocate, social media commentator, columnist, blogger and podcaster. She is also regularly quoted in the media. Robyn is a Fellow of both CA ANZ and CPA Australia, and a Registered Tax Agent. She regularly consults with the Treasury, ATO and professional bodies on technical issues including as a member of the ATO's Tax Practitioner Stewardship Group. Robyn was recognised in the Women In Finance Awards 2019 as the Winner of Thought Leader of the Year and was named in the global Top 50 Women in Accounting 2019. She was recognised in the Australian Accounting Awards 2020 as the Winner of both Thought Leader of the Year and the Accountants Daily Excellence Award.

Dr. Julianne Jaques QC, CTA, is a barrister specialising in taxation law and regularly appears in taxation matters in the AAT and Federal courts, including more recently in the cases of Sharpcan, Victoria Power Networks and Sole Luna. Prior to coming to the Bar, Julianne spent 10 years in private practice with a major accounting firm and a major law firm, and was senior taxation adviser to the Federal Assistant Treasurer. She is a Chartered Tax Adviser and a Chartered Accountant, and her doctoral thesis at the University of Melbourne was on the taxation of corporates. Julianne is a member of the Tax Practitioners Board and the Board of Taxation. In 2020, Julianne was awarded Chartered Tax Adviser of the Year by The Tax Institute.

Presenter profiles continued

Rachel O'Donnell, CTA, is Special Counsel and Head of Indirect Tax at Hall & Wilcox, with more than 15 years of experience advising on tax law. She specialises in GST, and duties, land tax and payroll tax issues in all Australian states and territories. Rachel has significant experience advising large listed and unlisted corporates, high net worth individuals and small to medium enterprises. She has a broad range and depth of experiences and is very familiar with the operation and technicalities of the GST and various state and territory tax regimes, which are constantly evolving. Rachel's clients include major international and national companies / groups in the property development, property funds management, infrastructure, superannuation, and retirement living / aged care industries, as well as high net wealth family groups.

Rajan Verma, FTI, started his career in tax in 2006 and has since amassed significant expertise in advising small to medium enterprises and privately owned businesses on complex taxation matters. His particular interests include complex business restructuring, property development, international taxation and trust law matters. In addition, Rajan has a wealth of experience in advising on state revenue and income tax matters generally as well as managing complex disputes with the Australian Taxation Office and state revenue authorities. Rajan regularly presents to members of the CPA and IPA and enjoys sharing his knowledge and expertise in tax with his colleagues, friends and other members of the profession. Rajan holds a Bachelor of Commerce, Bachelor of Laws and a Master of Laws from the University of Melbourne.

Chris Wookey, CTA, is now operating his own specialist tax consulting practice. Chris was previously a principal in the tax consulting division of Deloitte Private in Melbourne. A finalist in The Tax Institute's Tax Adviser of the Year Awards for 2020, he has over 30 years' experience in the chartered accounting profession and is co-chair of The Tax Institute's SME & Tax Practitioner Technical Committee and a member of the Victorian State Technical Resource Committee. Chris was also a member of the Board of Taxation's Reference Group for its recently released Review of Small Business Tax Concessions. His experience, centred on issues encountered by private groups and includes advising about applying CGT rollovers to facilitate moving from one entity structure to another.

Workshop Leaders

Daniel Angelovich is Director of the PWS Business Advisory team. Daniel graduated from Deakin University with a Bachelor of Commerce (with distinction) and Law and completed a Masters in Taxation at the University of Melbourne. He is a Chartered Accountant. Whilst specialist taxation consulting and advisory services are Daniel's area of expertise, he works closely with his staff and associates to provide a full financial service offering. By listening to his clients' goals and objectives, Daniel assists his clients by providing solutions which improve their personal and financial well-being, and ultimately achieve greater peace of mind.

Mark Gioskos, FTI, is a Senior Associate at Thomson Geer and specialises in giving advice in complex tax litigation and tax audit matters. He has extensive experience in negotiating and settling tax-related disputes, with an emphasis on achieving efficient and commercial outcomes for his clients. Mark also regularly advises clients on various compliance issues under both Federal and State based revenue laws, as well as corporate and governance issues, succession planning and estate administration, and other regulatory matters. Mark is a Fellow member of The Tax Institute, and lectures on various tax law topics as a Facilitator for The Tax Institute's Chartered Tax Adviser Program. He has also been a member of The Tax Institute's Professional Development Committee in Victoria since February 2015. Mark has written a number of articles published in professional journals, and is a regular presenter at seminars and discussion groups.

Workshop Facilitators

Arthur Athanasiou, CTA (Life), is a partner at Thomson Geer. Arthur's main area of practice is dispute resolution, particularly in the SME sector, with the ATO, TPB and the SRO. Arthur has many years' experience in complex tax audit, negotiations, settlements and tax litigation. He also has broad experience in the taxation of SME entities, with an emphasis on Division 7A and high wealth individuals and family groups. Arthur is an associate professor at La Trobe University Law School. He has qualified as a Chartered Accountant, is a former President of The Tax Institute, chaired the Law Institute's Tax Law Advisory Committee and now serves on the Industry Advisory Board of the IPA-Deakin University SME Research Centre. Arthur is an Accredited Tax Law Specialist, is a widely published writer on taxation issues and regularly appears in the mainstream media.

Glendon Coote, FTI is a Law Interpretation Specialist in the ATO's Tax Counsel Network where he advises on complex technical issues, primarily focused on corporate transactions and international matters in audits, objections and litigation. Prior to joining the Tax Counsel Network, he had over a decade's experience in senior technical leadership roles within the ATO and in private practice. Glendon is also a sessional teacher at the University of Melbourne where he has taught both taxation and corporations law.

Liam Cox is a tax specialist within the ATO's internal tax-counsel network. Liam has experience both inside and outside of the ATO in providing tax advice and managing tax disputes involving corporates and high net wealth groups. Liam's current areas of practice has a focus on international tax issues, division 7A and trust taxation.

James Den assists both Australian and international clients on a wide range of tax matters including corporate and private restructures, tax consolidation, taxation of trusts, tax losses and M&A transactions. James also has experience advising on various taxation administration and compliance issues for clients operating in a variety of sectors including real estate, media and technology markets.

Presenter profiles continued

Tim Kelleher, CTA, has been a Principal since 2009 and has more than 30 years' experience in Australia and Ireland. Tim is a dual qualified Chartered Accountant who's expertise includes tax compliance, tax consulting, M&A and business restructuring. Tim holds a Masters of Taxation from the University of Melbourne and has a high level of expertise in corporate and HNW group taxation issues, working in the SME arena including international taxation issues. Tim is a member of the DFK International Tax Committee. Tim also holds a CA Business Valuation Specialist accreditation.

James Leslie-Watt is an experienced corporate advisor and restructuring professional who has more than 14 years' experience in advising and managing all types of formal and informal personal and corporate insolvency administrations and turnaround engagements. James has gained extensive experience across a wide variety of business sectors providing strategic advice to clients and stake holders in agriculture, construction, retail, manufacturing, property, financial services and technology. James works extensively with his clients to uncover the financial and operational issues affecting a commercial business in order to deliver realistic high value solutions whilst supporting clients to maintain a high level of control. James holds a Graduate Certificate of International Legal Practice and Master of Laws (International Law) from Griffith University, Master of Business Administration (Finance) from the Australian Institute of Business, Professional Certificate in Arbitration from the University of Adelaide and is also undertaking further academic Masters course work in Intellectual Property Law at the University of Technology Sydney and Professional Accounting at Deakin University. James is a professional member of the Chartered Institute of Arbitrators, and the International Association of Restructuring, Insolvency & Bankruptcy Professionals (INSOL International).

Mark Macrae, CTA, is a senior associate in the taxation group at Arnold Bloch Leibler and provides technical and strategic tax advice to a range of clients including high-net-worth individuals, large private groups, public entities and not-for-profits. Mark's practice focuses on managing all stages of Tax Office audits and disputes, as well as advising on income tax, GST, and foreign investment laws.

Mark Morris, FTI, is the Principal of Morris and Associates which is a consulting firm advising a diverse range of public companies, private family groups and practitioners on complex tax matters including business structuring, mergers and acquisitions, employment taxes and succession planning. Mark has over 36 years experience in the tax profession having held senior roles in chartered accounting, commerce and academia. He is also the Co-Chair of the ATO's Digital Implementation Group and a member of the NTLG FBT Working Group and the Tax Practitioners Stewardship Group. He is also a regular speaker and author on tax matters. Mark is a registered tax agent, a member of The Tax Institute and CPA Australia and has been admitted to practice as a solicitor in Victoria.

Ashley Shield, having been the principle of his own Accountancy firm Ashley has a strong background in taxation and business services accounting. Ashley has a passion for assisting company directors through the insolvency framework. His deep understanding of the pressures of business ownership along with his extreme drive to assist clients through insolvency situations has him keenly focused around finding solutions. Over the last 12 years he has worked on may turnarounds as well as assisting 100's of business owners navigate both the corporate and personal insolvency framework. Ashley became a partner in 2014 and currently oversees the de Jonge Read team in Victoria. He is a sort after speaker by accounting firms in the area of assisting clients in financial distress and hosts a monthly webinar on the topic. Ashley is a member of the Turnaround Management Association.

Petr Vrsecky, is a Partner working in the PKF Melbourne Business Recovery and Insolvency team. Having worked in corporate and individual insolvency, as well as business turnaround since 1984, Petr is experienced in receiverships, liquidations, voluntary administrations, Part X and personal bankruptcy. He has also worked on informal workouts and advisory where formal appointments were not appropriate, forensic work and litigation support and acted as independent trustee in large estate disputes.

Andrew Wright, is a Special Counsel in the Maddocks Revenue Practice Group. Andrew has over 10 years' experience advising Australian corporate and family groups, property developers, Government (Federal, State and Council level), accountants and other professional advisers on all areas of Federal and State taxation law. Andrew's areas of expertise include advising on complex stamp duty and land tax issues (Australia wide), GST, GAIC and income tax law issues arising for his clients. He regularly provides direct and indirect tax advice on structuring of businesses and transactions, mergers and acquisitions, sale of land and businesses and corporate reorganisations which includes drafting and reviewing appropriate clauses and provisions into the relevant legal documentation as required. Andrew also regularly liaises with the Australian Taxation Office and State revenue authorities in managing investigations, audits and disputes and has successfully assisted many clients with resolving and settling tax and duty disputes.

Adrian Zuccarini, FTI is a Law Interpretation Director at the ATO within the Tax Counsel Network. He provides technical advice and guidance on complex technical issues arising within the Private Groups and High Wealth Individuals and Public Group and International areas. Adrian has over 10 years' experience within the ATO. Prior to working in the Tax Counsel Network Adrian has worked in the Private Groups and High Wealth Individuals area, with a focus on issues affecting professional firms.

Venue and accommodation

RACV Healesville Country Club & Resort

122 Healesville-Kinglake Rd, Healesville

The RACV Healesville Country Club & Resort provides a range of leisure, dining, accommodation and event options in the heart of Victoria's premier wine and fresh produce region, the Yarra Valley. Explore all the region has to offer, including wineries, galleries, wildlife, walking trails, adventure activities and local produce supplies.

Getting to the RACV Healesville Country Club & Resort

The resort is approximately a 90-minute drive from Melbourne Airport (Tullamarine) or Melbourne CBD. Car hire is readily available at Melbourne Airport and we encourage you to book when registering for the event.

Parking

RACV Healesville Country Club & Resort has ample free parking available for retreat guests.

Accommodation

RACV Healesville Country Club & Resort

RACV Healesville Country Club & Resort offers luxurious accommodation with stunning views of the resort. Accommodation is limited, book early to avoid disappointment.

A corporate rate has been negotiated with RACV Healesville Country Club & Resort. Please call 03 5962 4899 and quote "The Tax Institute" to secure your booking.

Yarra Valley Grand Hotel

Yarra Valley Grand Hotel is a small hotel located a short 15-minute drive away from the conference venue in Yarra Glen. This 3-star hotel can be booked by contacting 03 9730 1230.

Yarra Valley Lodge

Yarra Valley Lodge is a 30-minute drive from the conference venue. This 4-star hotel is located on a 120-hectare heritage estate. Bookings can be made by contacting 03 9760 3333.

Planning to stay for the weekend? As the premier wine region in Victorian accommodation is limited, we recommend you book your accommodation as soon as possible to avoid disappointment.

For more accommodation options, please visit https://visityarravalley.com.au/booking/list

How to register (full convention registration)

Register online or complete the form included in this brochure

Online: www.taxinstitute.com.au/2021YVTR
Fax: 02 8223 0077
Mail: The Tax Institute
Level 37, 100 Miller Street
North Sydney NSW 2060

For further information regarding this event, please contact the Vic Team on 03 9603 2000 or email vic@taxinstitute.com.au

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

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linkedin.com/company/the-tax-institute

insights.taxinstitute.com.au

Stay and play in the world-famous Yarra Valley

The Yarra Valley is widely renowned as Victoria's premier wine region, however there is an extensive number of other unique experiences for you to enjoy too. From hot-air ballooning to cycling and wildlife spotting, there is something for everyone! Some highlights are below, but for more information head to www.visityarravalley.com.au to plan your stay.

Golf pros

RACV Healesville Country Club & Resort offers an 18-hole golf course. Surrounded by beautiful native trees and vegetation, the Michael Clayton designed 18-hole course offers members a unique playing experience.

Bookings are essential. To book please call 03 5969 9451 and quote "The Tax Institute". Green fees – 9 holes cost $34pp, 18 holes $40pp. There is also a Pro Shop team onsite who will be able to assist with equipment hire bookings.

Spa fans

You deserve to pamper yourself! Book a relaxing massage or treatment at the onsite One Spa. Located at RACV Healesville Country Club & Resort, making it easier than ever to restore the mind and body before or after the conference.

Bookings are essential. To book, please contact One Spa on 03 5969 9388.

Thrill seekers

Soak up the fresh air in the picturesque Victorian countryside by completing one of the many walking or cycling trails. The ever-popular Lilydale-Warburton Rail Trail will provide wonderful views of the scenery, while those who would like more of a challenge could attempt to cycle to the Mt Donna Buang summit.

Experience the ultimate adrenaline rush and the region from above, with Hot Air Ballooning, plane rides and sky diving.

History buffs

A must visit for all history buffs is Coombe Yarra Valley. Once the home of Dame Nellie Melba, the estate is a bustling seven acres of stunning gardens famous for its high teas and Devonshire tea. Learn about the life of Dame Nellie Melba and her ever important role in Australian history.

Art enthusiasts

You'll find plenty of private galleries dotted across the region, highlights include Art at Linden Gate, TarraWarra Museum of Art, Monsalvat Art Centre and Healesville Glass Blowing Studio.

Wildlife warriors

Take a short 10-minute drive to Healesville Sanctuary where you can wander through serene tracks and meet over 200 species of Australian animals. You will be in awe of the beauty, strength and power of the Australian wildlife. With daily shows including: Spirits of the Sky and Tales from Platypus Creek, this is an experience not to be missed.

Snow lovers

Take a drive to one of Victoria's many pristine alpine mountains. You could be enjoying the snow in just under an hour at Mount Donna Buang or Lake Mountain.

Food, wine and drink connoisseurs

With over 80 cellar doors, it's easy to eat and drink your way around the Yarra Valley. A variety of food and wine tours operate 7 days a week.

Home to the world's best gin, Four Pillars Gin is the first Australian distillery to be awarded International Gin Producer of the Year in 2019. Visit the iconic distillery in Healesville and immerse yourself in one of their distillery masterclasses. These classes sell out very early, bookings are essential.

Yarra Valley harvests some of the best produce, including berries, limes, lemons and kiwi fruit. Fresh is always best, with an abundance of U-Pick farms, there is always something delicious in season to pick.

Operating every Saturday from 8am to 1pm, the Healesville Organic Farmers' Market is a must to get the freshest organically grown produce at affordable prices.

Event information

Registration options and inclusions

	Online access to presentations and technical papers	Morning/ Afternoon tea/ retreat lunches	Yarra Valley showcase & retreat dinner and retreat closing drinks	How to register
A **Full retreat registration** This registration option entitles one delegate to attend the entire event.	✔	✔	✔	Register online or complete the form included in this brochure.

*Additional tickets to the Yarra Valley showcase & retreat dinner and retreat closing drinks can be purchased on the registration form.

Please note: The registration fee does not include accommodation, hotel incidentals, transport to/from the retreat venue or printed materials.

Register online at taxinstitute.com.au/2021YVTR

Early bird offer

Register on or before Friday, 7 May 2021 to save.

Group discount

Purchase four full registrations and receive the fifth free. All attendees must be from the same firm and all registration forms must be submitted together. The free registration must be of equal or lesser value of the other registrations. This offer cannot be redeemed in conjunction with any other offer, promotional code or discount.

CPD hours

Attendance at the 2021 Yarra Valley Tax Retreat counts for 12 hours of Continuing Professional Development (CPD) accreditation with The Tax Institute.

Materials

To assist in lowering the environmental impact of the 2021 Yarra Valley Tax Retreat, the standard registration option will provide only electronic access to materials. PowerPoint presentations, technical papers and case study papers will be available via the attendee app for all participating delegates to download. Information on how to access these materials will be sent to all registrants by email a week prior to the event.

Dress code

Business casual attire is suitable for the duration of the 2021 Yarra Valley Tax Retreat.

Delegate list

A delegate list will be included on the attendee app to assist with networking. Please indicate on the registration form if you do not want your name included on the list.

Confirmation of registration

A confirmation will be sent via email. Please note you will receive two separate emails in the form of a confirmation email and a tax invoice.

Social functions

Yarra Valley showcase and retreat dinner – RACV Healesville Country Club & Resort

Following a day of technical sessions, delegates are invited to unwind with the casual style retreat dinner featuring the finest fresh produce and wines from the Yarra Valley region. Participate in the pre-dinner Yarra Valley showcase where local food and drink providers will come to you exhibiting the best of the Yarra Valley.

The Yarra Valley showcase and retreat dinner is included in the registration fee for full retreat delegates. Additional tickets are available to purchase for accompanying persons at a cost of $150. Please indicate your requirements, including dietary requirements, on the registration form.

Retreat closing drinks – RACV Healesville Country Club & Resort

Toast the closing of the retreat with award winning wines from Victoria's premier wine region.

The closing drinks is included in the registration fee for full retreat delegates. Additional tickets are available to purchase for accompanying persons at a cost of $35. Please indicate your requirements, including dietary requirements, on the registration form.

Event information continued

COVID-19 Event Guidelines

At The Tax Institute, the health and wellbeing of our members, delegates and employees is our top priority. Whilst returning to face-to-face events, we continue to actively monitor the situation regarding COVID-19 and follow the latest advice and guidelines issued by the Department of Health, the World Health Organization and relevant State authorities. Please click here for a summary of the measures The Tax Institute has put in place to ensure the safety of attendees at our face-to-face events, along with helpful links to assist you in preparing for your attendance at them. Please note, final implementation of any of these measures is subject to Federal and State Government requirements at the time of each event.

Contact tracing

We will keep a record of attendance for all meetings and events of The Tax Institute and will use this data for contact tracing purposes if necessary. For more information on how we will use the data that will be collected, and your rights in relation to that information, please see our Privacy Policy.

Cancellation policy

The Tax Institute reserves the right to alter, amend, postpone 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.

If a registered delegate is unable to attend a face-to-face event as a result of interstate border closures or they reside in or visited a COVID-19 hotspot, we will endeavour to transition the registration to an online registration for 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 delegate does not wish to transition their registration to the alternate online event, a full refund/credit will be provided.

In the case of a postponement of a face-to-face event which does not have an online element attached, The Tax Institute will provide a credit note which can be used for the same event or for a different event in the future.

It is a condition of acceptance of registration that an administration fee of 20% of the registration fee be charged for cancellation if you can no longer attend the event. Cancellations must be received in writing by The Tax Institute five working days prior to the event. No refund will be given for cancellations received within five working days of the event. A replacement may be nominated. If the replacement is not a member, the non-member registration fee will apply. CPD hours will be allocated to the designated attendee. The Tax Institute cannot accept responsibility for delegates' late transport arrivals or non-arrivals due to delays.

Privacy

We take your privacy seriously, and our policy can be viewed at: www.taxinstitute.com.au/go/footer/privacy.

2021 Yarra Valley Tax Retreat
Registration form

THE TAX INSTITUTE

41771 | WD

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

Full conference registration

	Member	New member*	Non-member
Early bird registration Received on or after 7 May 2021	☐ $1,450	☐ $1,790	☐ $1,750
Standard registration Received after 7 May 2021	☐ $1,650	☐ $1,990	☐ $1,950

Please contact the VIC office on 03 9603 2000 or vic@taxinstitute.com.au to enquire about group discounts.

☐ **I understand that the registration fees do not include printer materials. Access to materials will be electronic via The Tax Institute CPD app.**

Dietary requirements:

Promotional code:

***Become a member and save!**

Not a member of The Tax Institute yet? Sign up for membership along with your event registration and save with:

- up to 50% off membership to 30 June 2022
- member-only prices to this and future events
- free access to member-only technical resources.

Find out more about membership at info.taxinstitute.com.au/membership.

I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature: DD/MM/YYYY

2 Delegate contact details
If your member details are up-to-date, you can skip this section

Member no.: ____________________

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) Date of birth: DD/MM/YYYY

First name: Last name:

Position: Company:

Address:

Suburb: State: Postcode:

Telephone: Fax:

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 purposes.

3 Social functions

The Yarra Valley showcase & retreat dinner and retreat closing drinks are BOTH INCLUDED in the registration fee for delegates.

Monday, 26 July 2021 – Yarra Valley showcase and retreat dinner

☐ Yes, **I WILL** be attending the Yarra Valley showcase and retreat dinner **OR**

☐ No, **I WILL NOT** be attending the Yarra Valley showcase and retreat dinner

Additional tickets^

☐ Yes, I require additional tickets for the Yarra Valley showcase and retreat dinner at $150 per person

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

Tuesday, 27 July 2021 – Retreat closing drinks

☐ Yes, **I WILL** I will be attending the retreat closing drinks **OR**

☐ No, **I WILL NOT** be attending the retreat closing drinks

Additional tickets^

☐ Yes, I require additional tickets for the retreat closing drinks at $35 per person

No. ______ x tickets at $35 each: $ ______

^Please supply names of attendees and any dietary requirements as a separate attachment.

4 Payment summary

Registration fee	$
Additional guest tickets – Yarra Valley showcase and retreat dinner ($150 each)	$
Additional guest tickets – Retreat closing drinks ($35 each)	$
Total payable	$

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

5 Payment method

☐ **Cheque payable to The Tax Institute** (in Australian dollars)

☐ **Credit card** Card type: ☐ AMEX ☐ Visa ☐ MasterCard ☐ Diners

Name on card:

Card no.: Expiry date: MM/YY Cardholder's signature:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

For event enquiries, please contact the VIC Team on 03 9603 2000 or email vic@taxinstitute.com.au
For registration enquiries, please contact customeradmin@taxinstitute.com.au

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. For information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. [You can also request TTI's consultants to provide you with a copy of TTI Privacy Policy.] By submitting your application to TTI, you confirm that you have read TTIs Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy.

TO REGISTER

Online taxinstitute.com.au/2021YVTR

Mail L37, 100 Miller Street, North Sydney NSW 2060

Email customeradmin@taxinstitute.com.au

Fax 02 8223 0077

THE TAX INSTITUTE

L37, 100 Miller Street
North Sydney NSW 2060

Tel 02 8223 0000
Fax 02 8223 0077

For information, please contact VIC team
at vic@taxinstitute.com.au

taxinstitute.com.au

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