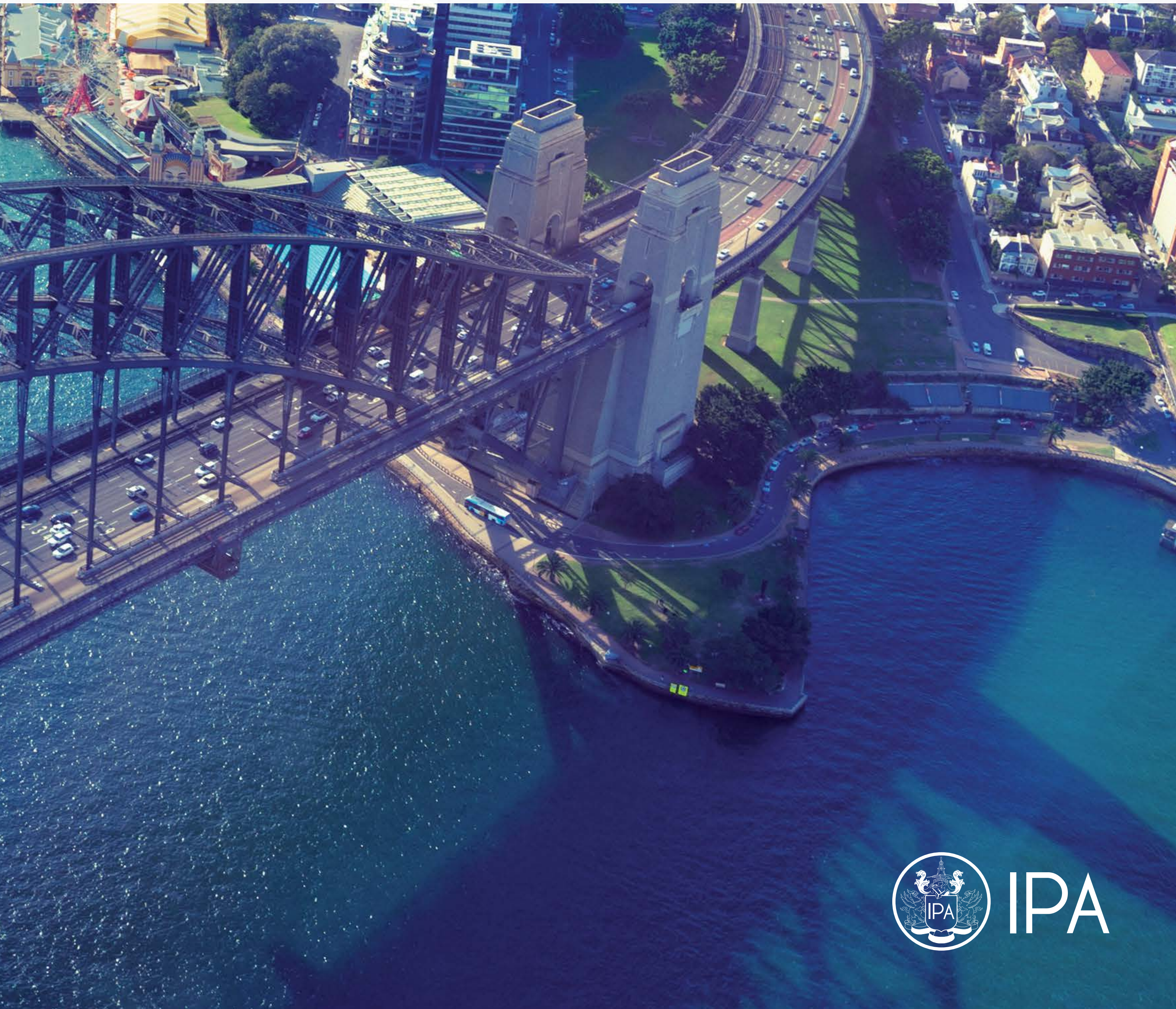
2016 NSW/ACT Public Practice Symposium

Thursday 17 - Friday 18 March

Rydges World Square, Sydney NSW



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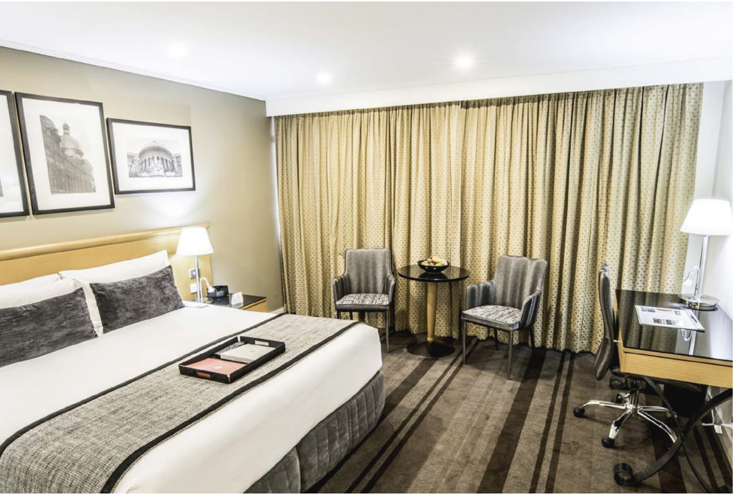
General Information




Venue

Rydges World Square Sydney

389 Pitt Street, Sydney NSW 2000

The hotel is conveniently located in World Square precinct, in Sydney's Central Business District. Location Map

Transport

Nearest Car Parking:

Parking at Rydges World Square Sydney

Valet Car Parking is available at a rate of $45.00 per day for conference delegates. To access parking, please park your vehicle in front the hotel entrance at 389 Pitt Street. The hotel concierge team will then park your vehicle for you. Payment can be made at the reception desk during the day.

Nearest Train Station:

The hotel is only 6 minute walk from Town Hall and Museum station.

Accommodation

The hotel offers accommodation room at $309 a night. Delegates can choose from a deluxe king/split king. Daily buffet breakfast is available at an additional $18 per person. Please contact the hotel's Reservations Team on 02 9268 1222 or reservations_worldsquare@rydges.com and quote the block code "IPA2016" to access the negotiated rates. Credit card is required to secure rooms.

Dress Code

Smart casual for the two day conference. Dinner - St Patrick's Day theme so everyone is encouraged to dress up! Best dressed will will a prize.

Social Functions

Wine Tasting

Thursday 17 March, 5pm - 6pm

(Included in the Full 2 Day and D1 only Registrations).

A complimentary wine tasting on the evening of Thursday 17 March, will give delegates and sponsors the chance to enjoy a range of wines from Australia's finest vineyards.

Dinner and Entertainment

Thursday 17 March, 6pm - 10pm

(Included in the Full 2 Day Registration - Additional Tickets can be purchased at $130 per person).

Join us for a St Patrick 's Day theme dinner, the perfect opportunity to relax and enjoy a night of light entertainment. The official dinner provides a fantastic opportunity to network and build connections with delegates and fellow business partners, whilst enjoying the delicious food.

Delegate Electronic Course Notes

We are going paperless! Due to significant delegate feedback from past conferences and to help lower our environmental footprint, all attendees will receive the course notes electronically this year. Speaker presentations will be available for delegates to download from the IPA website and print if required. An email informing delegates how to access the webpage will be sent at least two days prior to the Symposium date. There will also be complimentary wifi access in the seminar rooms at the venue so that delegates can access the presentations on their tablet computers or laptops during the Symposium.

Presenters

Andrew Conway FIPA

Chief Executive Officer, Institute of Public Accountants

A former Australian Government Treasury Ministry Chief of Staff, Andrew holds the record of being the youngest CEO of a public entity, when in 2009 he was 28 at the time of his appointment. Andrew has represented Australia at a range of International events including APEC, G20 and World Trade Organisation. Andrew was awarded the 2011 Young Professional of the Year award, appointed an adjunct Professor of Accounting at Shanghai University of Finance and Economics was appointed by the Victorian Governor as a Director of Eastern Health and in 2001 and was awarded the Centenary of Federation Medal through the Order of Australia. Andrew's academic background and qualifications are in Commerce, education and commercial law.

Ben Spargo

Director, Australian Taxation Office (ATO)

Ben is a Director in the Tax Office within the business line that has responsibility for the Tax Practitioner relationship, and Lodgment Compliance. Ben currently heads up an area that provides internal legal support as well as the Complaints and Ministerials area that, amongst other things, handles complaints from Tax Practitioners. Ben has worked in the ATO for 10+ years in a variety of roles in Customer Service functions as well as Compliance functions.

John Price

Commissioner, Australian Securities and Investment Commission (ASIC)

John commenced as an ASIC Commissioner on 21 March 2012. He has over 15 years regulatory experience in a variety of regulatory roles at ASIC relating to policy making, fundraising, mergers and acquisitions, financial services and products, licensing, insolvency and financial reporting and audit. John was previously a member of CAMAC, an advisory body to Government on corporate and markets issues and also the Financial Reporting Council, a body providing broad oversight of various accounting and audit-related issues in Australia. John is a current member of the Council of Financial Regulators, the coordinating body for Australia's main financial regulatory agencies. Prior to joining ASIC, John worked in the Gold Coast and Brisbane offices of Corrs Chambers Westgarth, a national law firm.

Ian Taylor

Chairman, Tax Practitioners Board (TPB)

Ian was appointed Chair of the Board on 22 January 2013. Ian worked as a tax partner with KPMG in Melbourne for 21 years before retiring and establishing his own tax practice as a registered tax agent. He was a Senior Lecturer in taxation law, financial management and accounting at Swinburne University in Melbourne for 13 years and has also served on school and community organisations and committees. Ian has a Bachelor of Economics, a Master of Business Administration and a Diploma of Education. He is a Fellow of CPA Australia and served as Chair and a member of its disciplinary committee. Ian is also a Fellow of Chartered Accountants Australia and New Zealand and has served as chair and member of its tax education committee.

Peter Adams

Director, LegScript Services

Peter has more than 20 years experience as a tax professional. He has worked in senior tax roles in both the profession and commerce having started his career with KPMG and PWC before moving on to become Head of Tax for BNP-Paribas (Australia and New Zealand) and subsequently Chase Manhattan-Ord Minnett. More recently Peter has been a Senior Tax Partner with Bell Partners and Kelly + Partners. Peter's career has also focused on delivering taxation education and training to professional Accountants throughout Australia; he was a Senior Tax Trainer with the Institute of Chartered Accountants; Taxation presenter and lecturer for WebbMartin, Kaplan and various Universities; and was a Senior Tax Writer with CC H Australia. Peter is renowned for his engaging presentation skills and outstanding technical knowledge of the Australian Taxation landscape.

Presenters

Ashley Course FIPA

Director, ARC Super

Ashley specialises in the provision of SMSF audit, technical and training services. Ashley has extensive experience designing and developing audit and quality control systems, plans and programs. For the last 7 years Ashley has trained and developed audit content for the professional accounting bodies and audit software providers. Ashley's most recent experience includes being part of ASIC's SMSF Auditor Competency Exam Committee and Treasury's Stronger Super working group. Ashley's experience also extends to training the CPA Australia Quality Reviewers on Auditing and Professional Standards and lecturing in Audit and Risk Management at Bond University on the Gold Coast.

Vicki Stylianou

Executive General Manager Advocacy & Technical, Institute of Public Accountants

Vicki joined the IPA in June 2007 from Federal Treasury, where she worked in tax policy, financial literacy, prudential regulation and in the Office of Best Practice Regulation on secondment. Prior to this Vicki worked as a lawyer in private practice specialising in commercial litigation both in Australia and overseas. Vicki holds a Bachelor of Jurisprudence, Bachelor of Laws, Bachelor of Arts and Masters of Business Administration (International Business). At the IPA Vicki leads the team responsible for the policy and advocacy work, as well as the innovation part of the business unit, which focuses on matters of interest to small business and small to medium practices.

David Bates

Managing Director, Workforce Guardian.

David works for Workforce Guardian, Australia's leading employment relations service for employers. David is proud to lead a team providing a wide range of strategic, practical and plain-English employment relations advice and support to Australian business owners and operators.

David gained his BA (Government) from the University of Queensland in 1998 before going on to complete a Law degree, with Honours, in 2001. He later moved to Canada and the United Kingdom where he was employed in a variety of HR, legal and public affairs roles within the public and private sectors, including extended engagement by HM Government.

David routinely represents employers in Fair Work-related proceedings and can assist with all aspects of employment relations compliance. David is also an accomplished and highly sought-after public speaker who facilitates dynamic, informative, and highly interactive workshops on all aspects of workplace relations best-practice. He is also the 'Switzer' program's Workforce expert, and can be regularly seen on the Sky News Business channel.

Aaron Lucan

Partner, Worrells

Aaron joined Worrells Sydney in January 2006 and became a partner of the firm in July 2013. Aaron has over 13 years' experience in all forms of corporate and personal insolvency administrations. In addition to servicing clients and referrers in Sydney and surrounding areas, Aaron manages Worrells' Central West NSW practice.

Aaron is an accomplished speaker. He presents more than 20 times a year at conferences and seminars throughout NSW and in the major capital cities around the country. His audiences include accountants, solicitors, bankers, mid-tier financiers and government agencies. He also conducts in house training sessions on insolvency related topics for professional services firms and government agencies.

Presenters

Alex Gelman

Partner Technology, Grant Thornton

Beginning his career in accounting, Alex worked for a range of corporates before moving across to IT. He was the founder of Consult Point and C9 Solutions now an integral part of Grant Thornton's Technology and Advisory practice. His expertise encompasses a wide range of business technology transformations projects across a range of corporate, government sector and Not for Profit clients. Alex's value is his ability to align strategic business needs with the right technology, bringing integrated and online technology to organisations who want to maximise operational effectiveness and reduce costs. Accomplished in both business and technology, he's worked with start-ups and merged firms as well as government departments and Not forProfits, to align their technology requirements with their business goals. Alex brings over 25 years of practical business and technology experience to clients who want to leverage technology to grow or rationalise their business Alex leads Grant Thornton Australia's Technology Practice

Robert Samuel

Partner Technology, Grant Thornton

Robert has over 25 years' experience in international business and technology, during which time he worked across financial services, trade and fast moving consumer goods (FMCG). Most recently he grew a national technology advisory and solutions business, Consult Point and C9 Solutions, now an integral part of the Grant Thornton Technology Advisory and Solutions offering. Robert has helped a range of commercial and Not for Profit organisations, and public sector agencies grow and respond to change. He specialises in providing clients with a strategic and practical view of major business challenges and approaches to addressing them that are as focus on people, process and external influences as much as the technology itself.

Program

Day 1 – Thursday 17 March 2016	8 CPE Hours
9.00am - 9.10am	**Welcome Address** Patricia Michel, *General Manager NSW & ACT, Institute of Public Accountants*
9.10am - 9.30am	**IPA Update** Andrew Conway FIPA, *CEO, Institute of Public Accountants*
9.30am - 10.25am	**Keynote - The Future of the Taxation Profession** Ben Spargo, *Director, Australian Taxation Office*
10.25am - 10.55am	Morning Tea and networking
10.55am - 12.00pm	**Keynote - ASIC Regulatory Update on Issues Relevant to Public Practice** John Price, *Commissioner, Australian Securities and Investment Commission*
12.00pm - 12.15pm	**Partner Update**
12.15pm - 1.05pm	Lunch and networking
1.05pm - 2.00pm	**Concurrent sessions:**
2.00pm - 3.00pm	**Concurrent sessions:**

1.05pm - 2.00pm Concurrent sessions:

- **Digital Disruption - A practical business focused response**
  - Growth opportunities (impact of business models, development and deployment of 'disruptive technologies', business applications what are making a difference, opportunities emerging in business analytics, getting the most of vendors and outsourced providers)
  - Cyber security threats and the security and protection of information systems

  Alex Gelman & Robert Samual
  Partner Technology, Grant Thornton

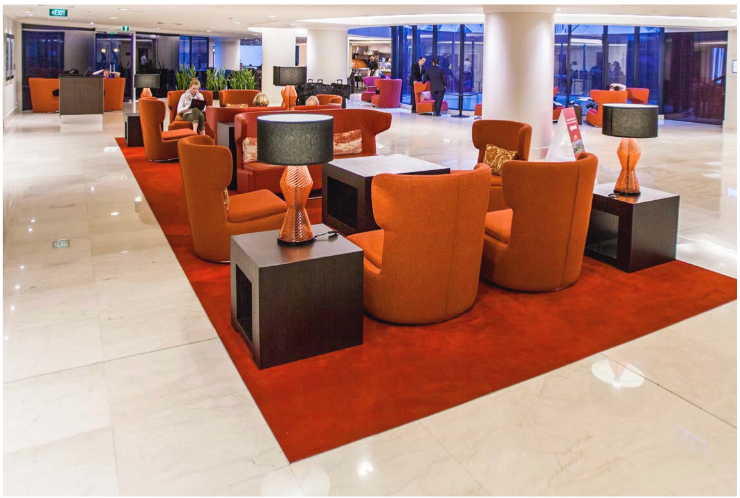
- **Fair Work / HR Tragedy - Why Your Clients Get it Wrong and How They Can Go On!**
  More and more employers are turning to their accountant for Fair Work / HR related advice. In this interactive session we'll explore the major red flags you should look for and discuss how you can help your clients to avoid the most common HR tragedies.
  David Bates
  Managing Director, Workforce Guardian

2.00pm - 3.00pm Concurrent sessions:

- **Legislative Developments and Update including Impact of Changes to the Financial Licencing Laws**
  Despite the never ending changes to legislation governing SMSFs, ATO statistics suggest the demand for SMSFs continues to grow at record rates. Furthermore, research indicates that trustees are more than willing to pay for accounting and advisory services if they believe the service will add value. So where does this leave your firm post 1 July 2016? If the impact of legislative changes to the SMSF Auditor regime are anything to go by, the removal of the accountants' exemption will provide enormous benefit to those firms electing to embrace these changes. This session will clarify these changes and the impact on your practice, and briefly discuss how professionals can take advantage of the opportunities they will face within the next 12 months and beyond.
  Ashley Course
  Director, ARC Super

- **Quarterly Tax Update**
  This session provides practitioners with a broad understanding of the most recent tax developments and how it impacts both their clients' tax affairs and their own. Topics relating to income tax, CGT, GST & FBT, Superannuation, specific business entities (individual, partnerships, trust & companies) and tax administration and regulation.
  Peter Adams
  Director, LegScript Services

Program



Day 1 – Thursday 17 March 2016 (continued) — 8 CPE Hours

3.00pm - 3.30pm	Afternoon tea and networking
3.30pm - 5.00pm	**Concurrent sessions:**

The Future of Financial Advice and How it Affects You

Currently, accountants are able to provide advice on SMSFs under the exemption provided by Regulation 7.1.29A of the Corporations Regulations 2001. With the FoFA reforms, this exemption will be removed. This session will give you further information and update leading up to July 2016.

Vicki Stylianou
Executive General Advocacy & Technical, Institute of Public Accountants

Taxation Aspects on exiting a Business

- Legal and tax characteristics of a sole proprietorship, partnership, trust and company
- Income tax, CGT and GST implications of selling a business either when selling the business assets or the stakeholding in the business vehicle
- Income tax, CGT and GST implications of winding up a business housed in companies or trusts
- Useful tax strategies to be utilised when for exiting a business by sale or winding up

Peter Adams
Director, LegScript Services

5.00pm - 6.00pm	Pre-dinner Wine Tasting
6.00pm - 10.00pm	**Dinner and entertainment**

Program

Day 2 – Friday 18 March 2016	8 CPE Hours
9.00am - 10.30am	**Keynote - Emerging Issues Affecting Tax Practitioners** Ian Taylor *Chairman, Tax Practitioners Board*
10.30am - 11.00am	Morning Tea and networking
11.00am - 12.30pm	**Corporate Insolvency: A 'How to' Guide for Accountants to Service and Retain Clients through Hardship** In addition to covering all the technical aspects of corporate insolvency, this session has been designed to help accountants to service and create value for their clients in during insolvency events and how to ensure that client survives for years to come. It will cover: • Types of insolvency appointments and when to invoke them. • How much should it cost and how much is it really worth? • How to get the best results for your client. • How to ensure your client is still your client next year. Aaron Lucan *Partner, Worrells*
12.30pm - 1.30pm	Lunch and networking
1.30pm - 3.00pm	**Family Trust Elections and Distributions** A compressive coverage of the core requirements for establishment of trust, including family trusts and also the tax advantages and disadvantages of family trusts. Peter Adams *Director, LegScript Services*
3.00pm - 3.30pm	Afternoon tea and networking
3.30pm - 5.00pm	**Key Taxation Elements of Deceased Estates and Estate Planning** This session will examine the taxation framework governing deceased estates, including recent legislative changes, rulings and court judgments pertaining to the same. Topics covered Include: • Legal nature of deceased estates • The various phases of existence for deceased estates • Key income tax principles relevant to deceased estates • Overview of the capital gains tax principles relevant to deceased estates • Tax treatment of minor beneficiaries of deceased estates • Cross-border issues for deceased estates • Moving assets around to and from deceased estates • Tax of superannuation death benefits • Business succession - tax issues in funding the transfer • Taxation of testamentary trusts - splitting and merging testamentary trusts Peter Adams *Director, LegScript Services*
5.00pm	Close

REGISTRATION FORM AND TAX INVOICE

ABN 81 004 130 643

2016 NSW/ACT Public Practice Symposium

Thursday 17 - Friday 18 March

Registration Closes 5pm, Thursday 10 March 2016

STEP 1 - CONTACT INFORMATION

IPA Membership Number ______________________ O Non Member

Title __________ First Name ______________ Surname ______________

Organisation ______________________________

Postal Address ______________________________

Suburb ______________ State __________ Postcode __________

Telephone ______________ Mobile ______________

Email ______________________________

Preferred Name for Badge (e.g. Bob Smith) ______________________

Special Requirements (disability, dietary or otherwise) ______________________

STEP 2 - CHOOSE YOUR REGISTRATION TYPE (PRICES INCL. GST)

REGISTRATION TYPE	GET IN QUICK PRICE (Register & Pay by 31 December 2015)	EARLY BIRD RATE (Register & Pay before 31 January 2016)	REGULAR RATE (Register & Pay between 1 February – 10 March 2016)
O Full 2 Day Registration	$599 Members	$709 Member | $949 Non Member	$849 Member | $1132 Non Member
O Single Day Registration O Day 1 O Day 2	N/A	$385 Member | $550 Non Member	$501 Member | $715 Non Member

STEP 3 – ARE YOU ATTENDING THE SOCIAL FUNCTION?

PLEASE TICK	INCLUSIVE SOCIAL FUNCTION (Refer to page 2 for further details)	ADDITIONAL SOCIAL TICKET (For Partners or Guests $130 each incl. GST)
O Yes O No	**Wine Tasting** Thursday 17 March, 5pm - 6pm **Conference attendees only*	
O Yes O No	**Dinner and entertainment** Thursday 17 March, 6pm - 10pm	Additional Name ______________ Qty ______ Dietary requirements ______________

STEP 4 – CHOOSE YOUR CONCURRENT SESSIONS ON PAGE 7 & 8

STEP 5 – PAYMENT

All amounts in this brochure are inclusive of GST. This form becomes a Tax Invoice upon payment. Please keep a copy for your records.

TOTAL PAYMENT (incl. GST)	$

O Cheque made payable to *Institute of Public Accountants* O Credit Card O Mastercard O Visa O American Express

Card Number ________ / ________ / ________ / ________ Expiry Date ______ / ______

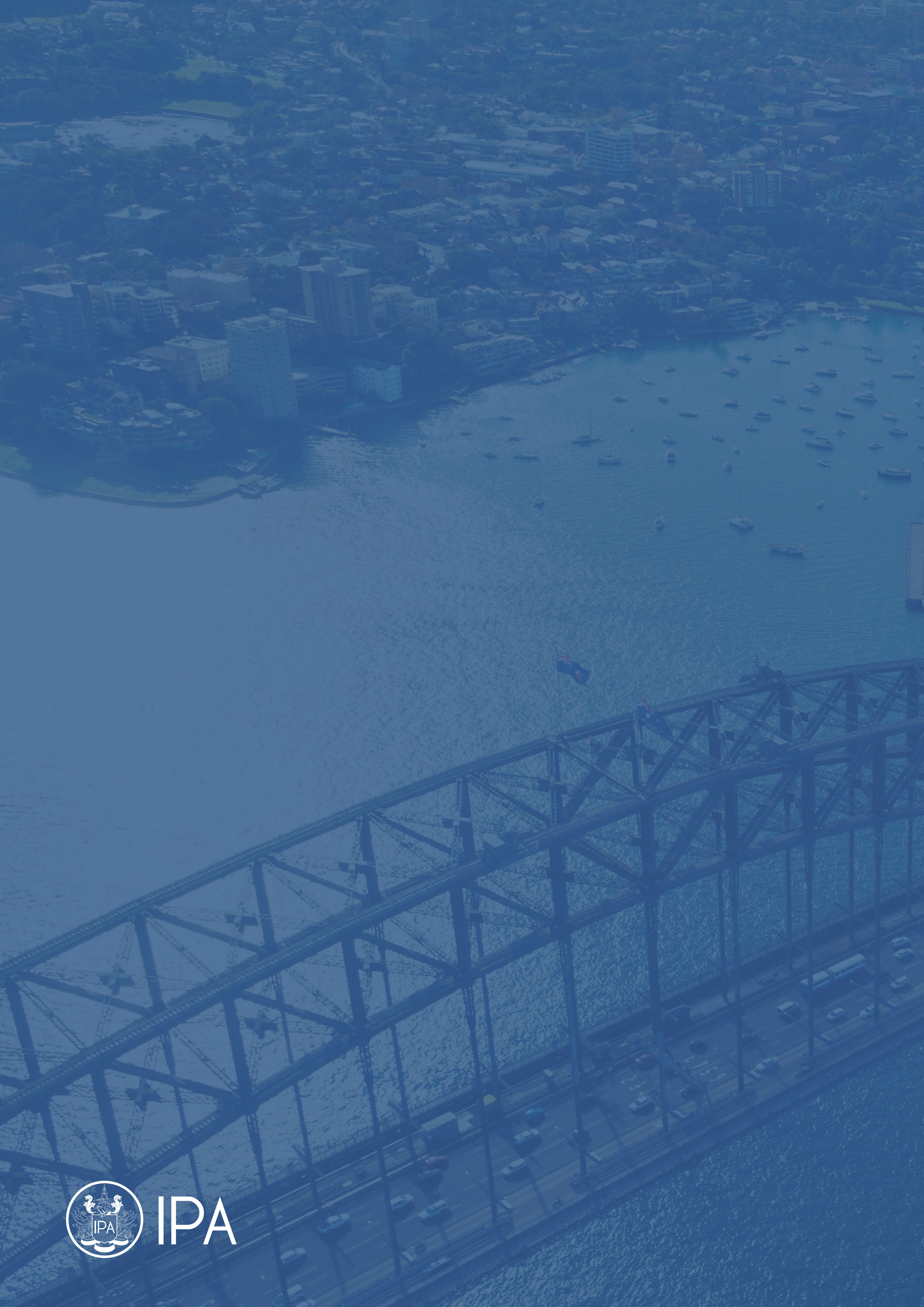
Cardholder's Name ______________________ Signature ______________

STEP 6 – SUBMIT FORM

Return this Registration Form to Institute of Public Accountants, Locked Bag A6090, Sydney South, NSW 1235
t 02 8262 6000 **f** 02 9251 5201 or **e** nswdivn@publicaccountants.org.au

Registration Confirmation - A confirmation email will be sent to you within 48 hours of the IPA receiving your registration. Please notify the IPA by phone or email if you do not receive a confirmation email within this timeframe.

Get in Quick Price $599 Register and pay by COB Thursday 31 December 2015. Special price is not in conjunction with any other offer. **Early Bird Discount*** Book and pay by COB Sunday 31 January 2016. **Conditions of Registration** IPA reserves the right to alter a program or specific presenter without notice, however, the program is intended to run as advertised. **Privacy Statement** The Institute of Public Accountants (IPA) acknowledges the importance of privacy and of safeguarding personal information. Any personal details provided to IPA will be protected in line with National Privacy Policy principles and the laws and regulations regarding such matters, as are applicable in Australia. **Cancellation Policy** Cancellations received in writing prior to 4 March 2016 will be accepted and all fees refunded less AUD$110 administrative fee. No refund will be given after 4 March 2016 (application for refund will only be considered under exceptional circumstances). Cancellation must be advised in writing. Delegates who cancel may nominate a substitute without penalty, or failing that will be given an IPA web link to access and print the course notes.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