

# 2025 VICTORIA CONFERENCE

20-21 February | The Continental, Mornington Peninsula



INSTITUTE OF  
PUBLIC  
ACCOUNTANTS®

## Tuesday, 18 February 2025 - Webinar

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Time (AEDT) Webinar

11.00am - 12.30pm ● **Common Tax Issues For Deceased Estates**  
Mark Morris, Director - Tax Know How

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## Wednesday, 19 February 2025

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Time (AEDT)

4.00pm **Wednesday Night - Settle in & Connect**

The Promenade

For those arriving on Wednesday you are welcome to join us for welcome drinks. Ease into the Conference experience with casual welcome drinks in the Promenade, at the Continental.

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CPD Competency Area

● Technical & Product Knowledge ● Management & Professional Skills ● Professional & Ethical Standards

Thursday, 20 February 2025

| Time (AEDT) | Halcyon Hall   | Coppin’s Lounge  |
|-------------|--|--|
| 8.00am      | Registration   |  |
| 9.00am      | <b>Welcome</b><br>Lucy Allen - MC  |  |
| 9.30am      | <div>●</div> <b>CEO Keynote</b><br>Andrew Conway, CEO - IPA Group  |  |
| 10.15am     | Morning tea  |  |
| 10.35am     | <div>●</div> <b>Victoria’s Economic Landscape: Trends and Opportunities for 2025</b><br>Peter Munckton, Chief Economist – BOQ<br><br>Explore the key economic trends shaping Victoria’s future in this insightful session tailored for small business accountants. From real estate dynamics and inflationary pressures to the impacts of the Federal Election and macroeconomic shifts, gain valuable insights to help your clients and business thrive. Discover how local factors, such as Victoria’s population growth, infrastructure investments, and evolving workforce demands, are influencing the economic outlook.  |  |
| 11.20am     | <div>●</div> <b>Communication and Wellness - Mindset Matters</b><br>Lucy Allen, Mindset + Leadership Coach - The Graceful Collective<br><br>How we think can have a huge impact on how we feel and subsequently what we are capable of.<br><br>This master class explores the impact of mindset and positive thinking, arming you with simple hacks for taking control of your thoughts so you can enjoy your happiest, healthiest and most condiment work and home life.<br><br>Leave Lucy’s session having a deeper understanding of: <ul style="list-style-type: none"><li>How we create perceived reality</li><li>Common positive thinking pathways</li><li>How to challenge the inner critic</li><li>The art of reframing</li><li>How to give challenges purpose</li><li>The importance of gratitude and daily celebration</li></ul>  |  |
| 12.05pm     | Lunch  |  |
| 12.50pm     | <div>●</div> <b>Protecting Your Business and Your Clients in a High-Risk Digital Age</b><br>Corey Rule, Business Development Manager - IPA Insure<br><br>In today’s digital age, protecting your business from cyber threats is more critical than ever. Working with a provider that can significantly reduce the risk of cyber threats and protect your business’s critical assets is not a luxury, it’s a necessity. Stay proactive and vigilant to ensure your business remains secure.  | <div>●</div> <b>Work-Life Balance for Accountants: The Benefits of Delegating Non-Core Tasks</b><br>Paul Dove, Senior Vice President of Sales - Cloudstaff<br><br>Providing practical tips and strategies for accountants to achieve a better work-life balance, focusing on managing workloads and avoiding burnout. We’ll explore how outsourcing time-consuming tasks such as payroll, invoicing, and client communications can significantly reduce stress, allowing accountants to focus on high-value tasks. By delegating non-core responsibilities, accountants can create a more manageable workload, leading to improved well-being and enhanced productivity. This session will demonstrate how outsourcing can be a key solution to achieving both professional success and personal balance.                  |
| 1.05pm      | Interlude  |  |
| 1.10pm      | <div>●</div> <b>Mitigating Your Risk: Advisors Under Fire</b><br>Ivan Glavas - Principal, Worrells<br><br>Join Ivan where he will delve into some real-world stories of advisors under scrutiny, from Phoenix activity gone wrong to bankruptcy cases involving complex void transactions and more.  | <div>●</div> <b>Small Business Excellence: Driving Growth, Impact, and Connection</b><br>Jamie Marra, Director/ Advisor Transcend Services, Merrin Munroe, Digital Marketer – Merrin Munroe Digital, Kerrie Canning, Director - HR Advice Online & Jayde Hayes, Manager Economic Development - Mornington Peninsula Shire Economic Development Unit<br><br>Join local experts in an interactive panel discussion on how small businesses can excel by boosting local communities, embracing new trends, and creating impact. This session will cover key areas such as practice management, marketing strategies, HR best practices, and wellbeing.<br><br>Learn how you as a small businesses can build strong communities, enhance the client journey, and create meaningful connections to grow and achieve your goals. |
| 1.55pm      | Interlude  |  |
| 2.00pm      | <div>●</div> <b>AML Reform Stage Two: The Next Steps</b><br>Jade Peace, COO - Lextech<br><br>As Australia progresses into the second stage of Anti-Money Laundering (AML) reforms, accountants are poised to encounter new regulatory landscapes that will significantly impact their practices. Join Jade as she delves into the intricacies of the upcoming AML regulations, offering practical guidance on how accountants can proactively prepare and adapt. Gain a comprehensive understanding of the compliance requirements and strategic approaches necessary to navigate these changes effectively.   | <div>●</div> <b>Discover the Power of AI: From Everyday Impacts to New Opportunities</b><br>Meagan Wood, APAC Product Marketing - Intuit Australia, Alan FitzGerald, Founder - Practice Connections & Maree Sortino, Director - The Social Secret<br><br>AI is seamlessly integrated into our daily lives, often operating behind the scenes. Join us for an engaging and informative session where we’ll delve into the evolution of AI and explore practical applications that can save your practice time and open doors to new opportunities. Leave the session with actionable insights and tips you can implement right away to increase efficiency and productivity.  |
| 2.45pm      | Afternoon Tea  |  |
| 3.00pm      | <div>●</div> <b>Cyber Security and Why It Matters – An Overview for Small Business from the National Office of Cyber Security</b><br>Xavier O’Malley, Assistant Director - National Office of Cyber Security<br><br>For small businesses, a cyber attack can be devastating—but with the right preparation, the risks can be managed. In this session, the Serena will present an insightful overview of the current cyber threat landscape in Australia, setting the stage for why small businesses should prioritise cyber security.<br><br>Learn how to navigate a cyber event, from immediate response to business continuity planning, and discover practical prevention measures and resources that can assist small businesses. Through a real-world case study, see the potential consequences of cyber incidents and gain an understanding of the newly introduced Cyber Security Act 2024, including its Limited Use provision. The session will also cover how and where to report cyber incidents, emphasizing why timely reporting is crucial for both individual businesses and the broader economy. | <div>●</div> <b>Protect and Defend: Navigating the Complexities of Wills and Estate Planning</b><br>Rohani Bixler, Principal Lawyer - Olive Tree Legal<br><br>Estate planning is more than just drafting a will—it’s about ensuring your legacy is protected and your loved ones are cared for. In this session, explore key strategies for navigating complex family dynamics, including blended families, and vulnerable beneficiaries. Gain valuable insights into common estate planning pitfalls, the legal consequences of inadequate planning, and proactive steps to safeguard your future.  |
| 3.45pm      | <div>●</div> <b>What Accountants Need to Know by July 1, TASA Reforms Unpacked</b><br>Tony Greco, General Manager of Technical Policy - IPA & Lisa Greig, FIPA FFA & Lecturer - University of Melbourne<br><br>With key TASA reforms taking effect from July 1, accountants need to be prepared. This session will cover what’s changing, how it affects you, and what key steps to take to stay compliant. This practical session will break down the updates clearly and concisely, giving you the knowledge to adapt with ease.   |  |
| 4.30pm      | <div>●</div> <b>A Conversation with Ruth Owen, Inspector-General of Taxation and Taxation Ombudsman</b><br>Ruth Owen, Inspector-General of Taxation and Taxation Ombudsman<br><br>Join Ruth Owen, Inspector-General of Taxation and Taxation Ombudsman, for an engaging and interactive session where your voice takes center stage. Ruth will provide an overview of her role and current initiatives aimed at enhancing tax administration and holding the ATO accountable. This is your opportunity to share insights, discuss areas for improvement, and ensure that future efforts align with your priorities and concerns within the tax system. Come prepared for a lively conversation that values your input and fosters collaborative progress.  |  |
| 5.15pm      | Education Concludes & Delegate Free Time   |  |
| 6.30pm      | Thursday Dinner - Disco Decadence  |  |

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Friday, 21 February 2025

| Time (AEDT) | Halcyon Hall  |
|-------------|---|
| 8.30am      | Registration  |
| 9.00am      | <b>Welcome</b><br>Lucy Allen - MC   |
| 9.15am      | <div><div>●</div><b>Finding Your Authentic Voice: Navigating Difficult Client Conversations with Confidence</b><br/>Sarah Wilmot, Director &amp; Speech Pathologist - Speech Pathways</div> <p>Effective communication is at the heart of successful client relationships, especially when navigating challenging discussions. Join Sarah Wilmot, Director and Speech Pathologist at Speech Pathways, as she shares her expertise in voice, breathing, and communication to help you manage these conversations with clarity and assurance.</p> <p>In this interactive session, Sarah will guide you through practical techniques to enhance your vocal presence, manage anxiety, and convey complex information succinctly. Drawing from her extensive experience in speech pathology and voice coaching, she will provide insights into tailoring your communication style to resonate with diverse audiences.</p>  |
| 10.15am     | Morning tea   |
| 10.30am     | <div><div>●</div><b>Keynote - Energising Enterprise</b><br/>Bruce Billson, Ombudsman, The Australian Small Business and Family Enterprise Ombudsman</div> <p>Small and family businesses are the backbone of the economy, yet post-COVID challenges have led to a 25% decline in the operating environment, according to the ASBFEO Small Business Pulse. In this keynote, Bruce will unveil practical steps to 'Energise Enterprise'—offering real solutions to rebalance risk and reward for small businesses. He will also highlight how ASBFEO supports businesses and their advisers, ensuring they have the tools, advocacy, and guidance needed to thrive in today's landscape.</p>  |
| 11.15am     | <div><div>●</div><b>Family Business Succession: Balancing Legacy and Growth</b><br/>Stephen Jones, Partner - Succession Plus</div> <p>This engaging and interactive workshop will explore key strategies for business valuation, succession, and exit planning—helping you maximize your business's worth while securing a smooth transition. Discover the critical internal and external factors that influence value, and gain insights into designing an effective succession strategy that aligns with both financial goals and family dynamics. Whether you're preparing to step away or simply future-proofing your business, this session will provide the essential tools to navigate succession with confidence.</p>   |
| 12.15pm     | Lunch   |
| 1.00pm      | <b>Local Curated Activities</b> <p>After lunch, immerse yourself in your preselected afternoon activity and make the most of your time in the stunning Mornington Peninsula. Each activity has been thoughtfully curated to foster meaningful connections, create memorable moments, and showcase the best of what this beautiful region has to offer. Dedicated coaches will be available to transport delegates to and from each activity, ensuring a smooth and enjoyable experience.</p> <div><b>Rejuvenate &amp; Recharge at Peninsula Hot Springs</b><p>Unwind at Peninsula Hot Springs, where natural geothermal waters and over 70 globally inspired wellness experiences await. Enjoy tranquil bathing, serene surroundings, and a 45-minute Qi Gong class, a moving meditation designed to restore balance and energy. The perfect way to relax and recharge!</p></div> <div><b>Golf at The Dunes Golf Links</b><p>Spend your afternoon on the greens of the renowned The Dunes Golf Links, enjoying 9 holes of golf with fellow delegates. Take in the stunning coastal landscape as you play, with golf carts provided and club rentals available on-site for a small fee. Whether you're a seasoned player or a beginner, it's a fantastic way to unwind and connect.</p></div> <div><b>Fresh Pasta-Making Experience at Green Olive at Red Hill</b><p>Learn the art of pasta-making at a beautiful vineyard and olive grove. Guided by an experienced chef, you'll craft fresh pasta using hand-picked ingredients and enjoy your creation with a glass of Estate wine. This hands-on culinary activity offers great food, stunning views, and the chance to bond with fellow delegates.</p></div> <div><b>Sip &amp; Savour: A Taste of Mornington Peninsula</b><p>Indulge in a luxurious Friday afternoon exploring the Mornington Peninsula. Enjoy intimate tastings at two boutique wineries before visiting a premium distillery for expertly crafted spirits. Breathtaking views, exceptional flavors, and a relaxed atmosphere— the perfect way to toast to a fantastic conference!</p></div> |
| 5.00pm      | Education Concludes   |
| 5.00pm      | <b>Friday Night – Final Toast</b><br>The Promenade <p>For those who would like to join, wrap up an inspiring two days for a relaxed drink on The Promenade, reflect on key takeaways, and toast to new opportunities. It's the perfect way to conclude your conference experience—informal, engaging, and filled with great company.</p>  |
| 6.00pm      | Event Concludes   |

Wednesday, 26 February 2025 - Webinar

| Time (AEDT)     | Webinar  |
|-----------------|--|
| 4.00pm - 5.00pm | <div><div>●</div><b>Continuing the unpacking of the TASA reforms</b><br/>Lisa Greig, FIPA FFA &amp; Lecturer - University of Melbourne</div> |