

**SA/NT CPE** JUL – DEC 2016

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# Continuing Professional Education



**IPA**

# BUSINESS MANAGEMENT

## Conflict: Why Early Intervention is Crucial

CPE Hours: 2

**Presenter:** Paul Bartley  
**Date:** Wednesday 31 August  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This introductory session will give you some basic tools for handling or at least recognising conflict situations that you encounter and provide some tools to manage the conflict.

### Topics covered in this seminar include:

- Disputes (Family Business, Directors, Partners, Commercial, Workplace)
- Pathways to resolve disputes
- Understanding the managers role in the dispute

## Managing Change in Times of Continual Change

CPE Hours: 3.5

**Presenter:** Patrick Mangan  
**Date:** Friday 2 September  
**Time:** 9.00am – 12.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session provides a practical guide to understanding and applying effective change management strategies, when the only constant is continual change. Real life case studies of successes and failures in change management highlight effective approaches.

### Topics covered in this seminar include:

- What is change management?
- Successes and failures in managing change in your organisation
- Implementing effective change management strategies

## Maintain and Enhance Your Professional Practice

CPE Hours: 3.5

**Presenter:** Patrick Mangan  
**Date:** Friday 7 October  
**Time:** 9.00am – 12.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session addresses key factors in maintaining and enhancing professional practice. A series of relevant and related topics for doing this are discussed, with success and failure case studies presented for additional discussion, then for participant action planning for their own practice.

### Topics covered in this seminar include:

- Strategic planning
- Flexibility and client responsiveness
- People management
- Organisation's code of conduct
- Quality and quality assurance

## Choosing Business Structures

CPE Hours: 1.5

**Presenter:** John Falzarano  
**Date:** Tuesday 18 October  
**Time:** 4.30pm – 6.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

Basic understanding of tax issues that arise with business structures and asset protection. It is also aimed at being a good introduction for junior and graduate accountants, staff members who are looking to gain a deeper understanding in this area.

### Topics covered in this seminar include:

- Setting up issues
- Ownership issues
- Trusts
- Joint names
- Companies
- Complying Superannuation Funds

## Charge Out Rate for Services

CPE Hours: 1.5

**Presenter:** John Falzarano  
**Date:** Tuesday 8 November  
**Time:** 4.30pm – 6.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

Planning and understanding staff capacity, staff utilisation, and charge-out rate is critical in managing the profitability of a service based business. This seminar looks to provide practice managers with tools for planning and forecasting capacity, utilization and revenue generation requirements.

### Topics covered in this seminar include:

- Define the relationship of charge-out rate on profitability
- Components for establishing a charge out rate
- Preparing operational budgets and implications of utilisation rates
- Reporting management of staff utilization

# BAS AND PAYROLL

## BAS Advanced Workshop

CPE Hours: 7

**Presenter:** Peter Adams  
**Date:** Friday 9 September  
**Time:** 9.00am – 4.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This seminar is designed to provide an update on the latest updates in BAS reporting and GST and increase your competence in preparing BAS documentation and provide great service to your clients.

### Topics covered in this seminar include:

- A refresher on GST fundamentals, including supplies and acquisitions and accounting for GST (cash or accruals method)
- Timing rules for paying GST and claiming GST credits

- When the usual timing rules don't apply
- Margin scheme
- Importing and exporting goods and services
- Dealing with selected transactions, such as financial supplies and acquisitions, second-hand goods and barter transactions
- Simplify accounting methods
- GST and annual private apportionment

## Payroll Update

CPE Hours: 3.5

**Presenter:** Glynn Flaherty  
**Date:** Tuesday 25 October  
**Time:** 9.00am – 12.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session is designed to update those in the payroll and/or human resources area with all that is happening in payroll. It will review what is happening in both Federal and State areas as relevant to employees and their payment.

### Topics covered in this seminar include:

- Industrial relations

- Superannuation
- Fringe benefits tax
- Pay As You Go withholding
- Termination calculations
- Payroll tax
- WorkCover

## CLIENT SERVICES

### Assisting Clients with Cash Flow Issues

CPE Hours: 2

**Presenter:** Andrew Russo  
**Date:** Thursday 28 July  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

It is estimated that 60% of businesses that go bust do so because of poor cash flow not lack of profits. The role of a good accountant is to help their clients effectively manage their cash flow. To do that you need to understand their business and adopt a planned and proactive approach.

#### Topics covered in this seminar include:

- Decision making
- Waste removal
- Product/service impacts
- Income growth
- Budgets

### Working with Start Ups

CPE Hours: 2

**Presenter:** Andrew Russo  
**Date:** Tuesday 30 August  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

Working with start-ups is more than just compliance. Sure they need to get right their trading structures, risk planning, GST etc. however, many need help with research, funding, planning, product development.

#### Topics covered in this seminar include:

- Stages of business development
- Business plan V Business model
- Business school V Entrepreneurship school
- Business canvas

### Succession Planning – Buying and Selling a Business

CPE Hours: 1.5

**Presenter:** Andrew Russo  
**Date:** Thursday 22 September  
**Time:** 4.30pm – 6.00pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

The seminar isn't just for those looking to sell their business soon, but anyone who wants to better understand how to increase their price when they do sell or hand across the business. It is also for accountants who want to assist their clients in maximising the value of their business.

#### Topics covered in this seminar include:

- A step by step guide to the mechanics of buying and selling a business with checklist
- Finances and sales performance
- Expenses, debts and liabilities
- Business assets including Intellectual Property

- Business Operations
- Legal and Tax compliance
- Risk assessment process
- Valuation wrap up – what impacts the value of a business?
- What does a 'ready for sale' business look like?

### Practical Valuations for SMEs

CPE Hours: 7.5

**Presenter:** Andrew Mills  
**Date:** Friday 28 October  
**Time:** 9.00am – 4.30pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

This seminar will cover different methods of business valuation, including discounted cash flow analysis, earnings multiples and rules of thumb. It will provide a theoretical background before exploring each of the valuation methods. The pros and cons of each method will be analysed using working examples.

#### Topics covered in this seminar include:

- The importance of value and how it can assist your decision making
- The difference between price and value
- Approaches to valuation including the different methods available for small and large business

- Using discounted cash flow (DCF), earnings multiples and rules of thumb to value a business
- Alternative methods occasionally employed and associated pitfalls
- Applying valuation concepts to the share market

## CLOUD TECHNOLOGY

### Xero and Cloud: Your Questions Answered

CPE Hours: 2

**Presenter:** Steven Leaney and Nick Ciccocioppo  
**Date:** Wednesday 9 November  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

The cloud is changing how accounting firms operate and the services they can provide to clients. It is also opening up the door to business data and analysis that accountants can use to improve their business and that of their clients. This session will explain the changes happening across the accounting industry and how firms are capitalising upon the changes to provide greater insights and services to their clients. The Xero add-on ecosystem is a vast collection of cloud-based business applications that bring advanced technologies to SMEs in order to streamline every-day business tasks. Connecting with Xero, these applications help businesses to reduce admin time, and use real-time data to make better business decisions.

#### Topics covered in this seminar include:

- How accounting practices are changing in the landscape
- How accountants are using the new data in business
- The Xero add-on Ecosystem explained
- What types of apps exist
- How apps share data with Xero
- How should you approach implementing a solution for a client

# HUMAN RESOURCES

## HR Master Class

CPE Hours: 8

**Presenter:** David Bates  
**Date:** Thursday 17 November  
**Time:** 9.00am – 5.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

The HR Masterclass will provide participants with a comprehensive, plain-English and highly-practical overview of Australia's unique and sometimes complex HR and employment-related laws. Topics covered in this seminar include:

- National Employment Standards (NES)
- Modern Awards - coverage and interpretation

- Record-keeping requirements
- Determining minimum legal rates of pay
- Preparing compliant employment contracts
- Lawful dismissals and genuine redundancies
- Common HR-related myths

## Managing Employee Terminations

CPE Hours: 3.5

**Presenter:** Glynn Flaherty  
**Date:** Wednesday 23 November  
**Time:** 9.00am – 12.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session will provide up to date information on how to process terminations covering resignation, dismissal, retirement, death and redundancy and the on cost obligations with termination payments covering superannuation, Payroll Tax and WorkCover.

**Topics covered in this seminar include:**

- Fair Work Act – impact on terminations
- Unfair dismissal rules
- Redundancy payments

- Employer termination payments
- Excluded and non excluded ETPs
- Deceased employees
- Leave entitlements
- Paperwork requirements
- Super, Payroll Tax and WorkCover implications
- Preservation age rules and tax impact

# NOT-FOR-PROFIT

## Not-For-Profit Workshop

CPE Hours: 7.5

**Presenter:** Brenton Cox  
**Date:** Wednesday 21 September  
**Time:** 9.00am – 4.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session will look at three distinct topic areas of important relevance, both for those working within the not-for-profit sector and also for those in public practice with not-for-profit sector clients. The morning component will look at the issues of GST and FBT for not-for-profits and will have a technical focus but also be very practical in style.

The afternoon component will focus on not-for-profit reporting and will look at the broad principles behind

what reporting is to aiming to achieve, both from a legislative perspective and from a stakeholder perspective

**Topics covered in this seminar include:**

- Advanced GST for NFPs
- FBT & Salary Packaging for NFPs
- NFP Financial & Management Reporting

# SMSF & SUPERANNUATION

## SMSF Contributions

CPE Hours: 2

**Presenter:** Shirley Schaefer  
**Date:** Tuesday 2 August  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session will provide a review of the current superannuation contribution rules and the proposed changes that may impact the work you do with your clients.

**Topics covered in this seminar include:**

- When can contributions be accepted by a SMSF?
- When must contributions be refunded?

- Excess Contributions Taxes (or removal of)
- Div 293 Tax (surcharge)

## Superannuation Law for SMSF

CPE Hours: 2

**Presenter:** Shirley Schaefer  
**Date:** Wednesday 24 August  
**Time:** 8.00am – 10.00am  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session provides an introduction to Superannuation Law as it applies to Self Managed Super Funds. Delegates will be given a good understanding of the superannuation law that trustees of SMSFs must comply with in order to maintain a complying superannuation fund and receive concessions.

**Topics covered in this seminar include:**

- Loans to members and relatives
- Related party investments
- Strict borrowing provisions
- Contributions requirements
- Accessing retirement savings from SMSFs

## Advanced SMSF Strategy Workshop

CPE Hours: 8

**Presenter:** Shirley Schaefer, Matthew Tripodi, Cathi Norman, Monte Engler, Matthew Allan  
**Date:** Tuesday 13 September  
**Time:** 9.00am – 5.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This full day seminar will include a variety of speakers presenting on the following:

- SMSF Contributions
- SMSF Admin and Reporting
- Death Benefits and Estate Planning
- Property and Limited Recourse Borrowings

# Professional Assist

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# SMSF & SUPERANNUATION CONT.

## SMSF Tax Planning

CPE Hours: 2

**Presenter:** Shirley Schaefer  
**Date:** Wednesday 26 October  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

Income Tax and SMSFs can be a complex area as the ATO and government move the goal posts and change the rules. Since 2007 there have consistently been regular changes to the income tax rules and concessions applicable to SMSFs and the 2016 Federal Government Budget introduced even more.

### Topics covered in this seminar include:

- Taxation of contributions
- Taxation of excess/additional contributions
- Taxation of a SMSF – accumulation phase
- Taxation of a SMSF – pension phase
- What is NALI

## SMSF Advanced Audit

CPE Hours: 8

**Presenter:** Shirley Schaefer  
**Date:** Thursday 10 November  
**Time:** 9.00am – 5.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This session will provide an update and of SMSF Audit requirements, specifically SIS compliance audit issues, from accepting the client to preparing the report.

### Topics covered in this seminar include:

- Fund Administration
- Definition of a SMSF
- Contributions
- Auditing Pensions & Benefits (including death benefits)

- Investment Strategies & Investment Restrictions
- Collectible assets and sole purpose test
- Investment structures (related parties & LRBA's)
- Provision of Financial Assistance
- Borrowings
- Auditor reporting & dealing with the ATO

## SMSF What Can Go Wrong

CPE Hours: 2

**Presenter:** Shirley Schaefer  
**Date:** Thursday 1 December  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

The session will look at the client, accountant, auditor & ATO aspects of the contraventions and the tools available to rectify contraventions.

### Topics covered in this seminar include:

- What are the most common contraventions?
- How are the ATO dealing with different types of contraventions?
- How best to fix problems that arise

- Contraventions & the new trustee penalty regime
- Communication with the trustee
- Communication with the ATO
- Voluntary Disclosure to the ATO

# STUDENT

## Graduate Tax Program

CPE Hours: 7

**Presenter:** Peter Adams  
**Date:** Thursday 20 October  
**Time:** 9.00am – 4.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

This seminar will examine the fundamental principles underpinning the operation of Australia's income tax regime, including consideration of prevailing tax legislation, ATO Rulings and court judgments.

### Topics covered in this seminar include:

- Tax residency
- Assessable income
- Exempt income and NANE income

- Taxation of foreign income
- Taxation of capital gains
- General and specific allowable deductions
- Tax offsets/rebates
- Calculation of taxable income and tax loss
- Taxation of partnerships, trusts and companies

# TAXATION

## Travel, Travel Allowances, Entertainment and Home Office Expenses

CPE Hours: 1.5

**Presenter:** Koby Lockett  
**Date:** Tuesday 5 July  
**Time:** 4.30pm – 6.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

Taxation advisers are often asked about the deductibility of various travel, entertainment and home office expenses. This seminar looks at what deductions are available in various scenarios and also explains the taxation of travel allowances and the implications for the substantiation rules.

## Multiple Holdings and Land Tax

CPE Hours: 1.5

**Presenter:** Dom Cosentino  
**Date:** Wednesday 10 August  
**Time:** 4.30pm – 6.00pm  
**Location:** IPA Training Room  
Level 2, 422 King William Street  
Adelaide

The Multiple Holdings and Land Tax seminar is incredibly beneficial for property investors who have multiple properties to understand the ins and outs of land tax. Topics covered in this seminar include:

- What is land tax?
- Who is liable for the payment of land tax?
- How is land tax calculated?
- What are the land tax rates?
- Single and multiple holding tax

- Why this may be your first land tax account
- What land is exempt from land tax?
- Trusts
- Contracts to evade land tax

# TAXATION CONT.

## Estate Administration and Planning

CPE Hours: 2

**Presenter:** Ben Wilson  
**Date:** Tuesday 16 August  
**Time:** 4.30pm – 6.30pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

Whether you are assisting clients with their estate and succession planning or managing a deceased estate, there are many issues to consider. It is important that you can identify possible risks and areas for dispute so that you can appropriately advise your clients.

## Quarterly Tax Update

CPE Hours: 2

**Presenter:** Peter Adams  
**Date:** Thursday 8 September  
 Tuesday 1 November  
**Time:** 8.00am – 10.00am  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

Comprehensive coverage of key changes and developments on the Australian taxation landscape over the preceding quarter relevant to income tax, GST and FBT.

**Topics covered in this seminar include legislation, court judgments and ATO rulings pertaining to:**

- Capital allowances,
- Small business entities

- Superannuation
- Individuals, partnerships, trusts and companies
- Tax administration

## GST Update and Current Issues

CPE Hours: 3

**Presenter:** Peter Adams  
**Date:** Thursday 8 September  
**Time:** 1.00pm – 4.00pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

This seminar will provide participants with a comprehensive of recent GST developments in Australia over the last 12 months, inclusive of:

- Legislation
- Rulings
- Determinations

- Cases
- Government announcements

## Preparation of Company Tax Returns

CPE Hours: 7

**Presenter:** Peter Adams  
**Date:** Friday 21 October  
**Time:** 9.00am – 4.00pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

This full day seminar will give you practical hands on understanding of tax. The day will start by an introduction to Australian Tax Law, the Australian Taxation System and the fundamentals of income and deductions and will proceed through to the more

complex areas of income categories such as trading stock, capital gains, small business CGT concessions and taxation of company structures.

## Tax Residency

CPE Hours: 3

**Presenter:** Peter Adams  
**Date:** Tuesday 1 November  
**Time:** 1.00pm – 4.00pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

This seminar focuses on the key drivers and implications of tax residency including aspects pertaining to income tax and capital gains tax. In addition it also canvasses the principles in Australia's tax treaties that govern the determination of tax residency.

**Topics covered in this seminar include:**

- Income tax framework for determining tax residency
- Categories residency recognised under Australian tax law

- CGT aspects of tax residency, including the mechanics of the new foreign resident withholding tax regime
- Statutory and common law sources of income under Australia's tax framework
- Income tax risks and opportunities relevant to tax residency

## Tax Aspects of Winding Up Trusts and Partnerships

CPE Hours: 3.5

**Presenter:** Peter Adams  
**Date:** Wednesday 2 November  
**Time:** 9.00am – 12.30pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

This seminar will examine the taxation aspects of winding up companies, including recent legislative changes, rulings and court judgements pertaining to the same.

**Topics covered in this seminar include:**

- Key income tax principles relevant to winding up trusts and partnerships and distributions to beneficiaries of trusts and partners in the partnership

- Comprehensive of the capital gains tax principles relevant to winding up trusts and partnerships
- Tax effective for winding up trusts limiting tax liability for trustee and beneficiaries
- Tax effective for winding up partnerships limiting tax liability for partners
- Effect of recent court judgement pertaining to taxation aspects of winding up trusts and partnerships

## Tax Aspects of Winding Up Companies

CPE Hours: 3.5

**Presenter:** Peter Adams  
**Date:** Wednesday 2 November  
**Time:** 1.00pm – 4.30pm  
**Location:** IPA Training Room  
 Level 2, 422 King William Street  
 Adelaide

This seminar will examine the taxation aspects of winding up companies, including recent legislative changes, rulings and court judgements pertaining to the same.

**Topics covered in this seminar include:**

- Key income tax principles relevant to winding up companies and distributions to shareholders

- Comprehensive of the capital gains tax principles relevant to winding up companies
- Tax effective for winding up companies limiting tax liability for company and shareholders
- Effect of recent court judgement pertaining to taxation aspects of winding up companies

## Speaker Profiles

### Peter Adams

Peter has more than 20 years experience as a tax practitioner, having worked in senior tax management roles in the profession with both KPMG and PwC as well as in commerce. Recently Peter has focused on providing tax consulting and tax training services in the SME market. He has a wealth of tax knowledge and is a sought after presenter on a wide array of tax topics.

### Matthew Allan

Matthew joined WRP Legal & Advisory in February 2015. Prior to joining WRP, Matthew was a partner at national firm HWL Ebsworth Lawyers commenced his career in the Tax & Legal Services Division of PwC in 2003, transferring to Kelly & Co. Lawyers in 2006. Whilst a partner at Kelly & Co. Lawyers and HWL Ebsworth Lawyers, Matthew was the partner-in-charge of a nationwide trust deed review service with respect to SMSF 'limited recourse borrowing arrangements' offered by one of Australia's largest financial institutions. Matthew holds a Master of Applied Taxation, a Bachelor of Laws, Bachelor of Commerce, Graduate Diploma of Chartered Accounting and a Graduate Diploma in Legal Practice and is a member of the Law Society of South Australia, The Tax Institute and the SMSF Association.

### Paul Bartley

Paul Bartley was a past SA Divisional President of the IPA. As well as a Public Practice Accountant, Paul is heavily involved as a Mediator holding a Masters Degree from UniSA in Mediation and Conflict Resolution as well as a Grad Cert in Employment Law from Curtin University. Currently Paul is working in the field of Elder Mediation specialising in the disputes arising from Elderly Business Owners.

### David Bates

David is the Managing Director of 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 is also an accomplished and highly sought-after public speaker who facilitates 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.

### Nick Ciccocioppo

Nick is a Chartered Accountant turned "Cloud Integrator" having started Accpac Solutions as a division of accounting firm Altitude Advisory. Working primarily within the Xero add-on ecosystem, Nick is able to consult across a wide range of industries and business requirements.

Having spent the last 4 years implementing cloud-based business solutions that transform the performance of SMEs, along with 15 years in accounting and business advisory, Nick is well placed to navigate small businesses through the often-confusing and rapidly changing technology landscape.

### Dom Cosentino

Dom Cosentino, Managing Partner of PKF Kennedy works in Tax, Accounting and Business Services, servicing small to medium enterprises and professional clients across a range of industries.

Dom has a particular interest in taxation issues involving the development and leasing of residential and commercial property including Goods and Services Tax, Capital Gains Tax and other income tax advice as it applies to property. He also lectures in a number of courses relating to property and taxation and tutors in management accounting at university level.

### Brenton Cox

Brenton has many years of experience in senior finance and consulting roles, across a diverse range of sectors and organisations. Initially he worked within a professional practice environment at KPMG and Bentleys MRI, managing a portfolio of small business and investor clients. After a nine month sabbatical overseeing a small humanitarian aid team in Romania, he took up the role of Finance Manager with the Port Adelaide Football Club. Since leaving the AFL scene in 2008 he has worked extensively in finance, accounting, management and advisory roles across the not-for-profit sector, for organisations such as Guide Dogs SA, Zoos SA and the Adelaide Festival Centre. He is passionate about the effective functioning of the sector and his areas of speciality including all aspects of accounting, financial reporting, governance, statutory and legislative requirements, and not-for-profit startups. He currently works as Accounting & Technical Consultants with Not for Profit Accounting Specialists in Adelaide.

### John Falzarano

John works in the areas of business services and taxation, and is based in PKF Kennedy's Adelaide office. He also acts as the PKF Kennedy CEO.

John is also involved in the administration and management of various estates for Protected Persons, dealing with investment portfolios and day to day operations, in his capacity as court appointed Manager.

### Glynn Flaherty

Glynn is the director of Payroll Matters, a chartered accountancy practice and registered tax agent that specialise in all payroll and employment related taxation issues. Payroll Matters contributes to many technical payroll related publications and are authors of specialist taxation termination software.

### Steven Leaney

Steven is a Senior Account Manager at Xero and a Chartered Accountant. He has owned and sold small businesses and absolutely loves using technology to create more efficient systems and processes. His motto is to "automate the guts out of everything" and is passionate about any system which saves businesses time and money.

### Koby Lockett

Koby is a Chartered Accountant and the Xero Practice Manager of PKF Kennedy. He has worked in Tax, Accounting, Superannuation and Business Services for over 7 years, servicing small to large enterprises and professional clients across a range of industries. Koby has a particular interest in taxation issues involving the farming industry, start-up tradesman businesses and the mining sector in which he prepares the annual financial statements and tax returns for multiple companies listed on the Australian Stock Exchange.

### Patrick Mangan

Patrick has managed Pas Mango Consulting for over 23 years. Pas Mango Consulting was created to service organisations and businesses in the Asia Pacific region in organisational review, strategic and business planning, performance management, and executive and manager profile management and has worked extensively with Boards and Board directors to improve corporate governance and Board performance reviews.

### Andrew Mills

Andrew has past experience working in stock broking, corporate treasury, business analysis, strategy and SME consulting. He presents Australia-wide on topics including financial modelling, valuation and business analysis. Andrew's qualifications include Bachelor of International Business, Grad. Dip. App. Finance & Investment, and an MBA.

### Cathi Norman

Cathi is a Senior Manager at Pitcher Partners Adelaide with over 15 years experience. She is a specialist who manages the Superannuation Division and provides superannuation services to private clients and families. Managing a team of superannuation specialists, Cathi ensures that accounts, tax planning strategies, retirement planning and audits are carried out in a highly effective manner on behalf of her clients.

### Andrew Russo

Andrew has had 32 years experience providing management services to his clients including the development of systems & procedures, key indicators, benchmarking and development of profit improvement plans. Andrew works with business leaders to unlock the potential in their business by helping them to develop and implement powerful strategies to address their key growth and profit issues. Andrew mentors large and small to medium size enterprises. He has been involved with the South Australian Young Entrepreneur Scheme as a mentor and workshop presenter for ten years. Andrew is also an accredited Mindshop facilitator in South Australia.

### Shirley Schaefer

Shirley is the national superannuation partner for BDO. She is an auditor by training and a SMSF specialist by choice. She established a separate superannuation division at BDO in 1996, recognizing the need to provide high quality technical services to clients with self-managed superannuation funds. Shirley is a regular speaker at SMSF and audit conferences. She provides SMSF competency training for accountants and auditors and is the author of the Thomson Reuters SMSF Audit Guide.

She is an accredited specialist adviser and accredited specialist auditor of the SMSF Association (SMSFA); a fellow of the Association of Superannuation Funds Australia (ASFA); a fellow of the Institute of Chartered Accountants in Australia (ICAA) and a registered SMSF auditor.

### Matthew Tripodi

Matthew is a specialist superannuation and estate planning lawyer. He is the founder and Principal of MT Lawyers, a boutique firm located just off Rundle Street in the East End. Matthew was previously a partner of Minter Ellison in Adelaide, and has also lived and worked as a lawyer in London and Hong Kong.

### Ben Wilson

Ben is a Partner with law firm Cosoff Cudmore Knox. Ben is a member of the Law Society, a Chartered Tax Adviser, a member of the State Council of the Tax Institute and a former member and chair of the Tax Institute's Education Committee. Ben has a wide range of experience in corporate and commercial transactions, with a particular focus on taxation and succession planning.



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**Mail:** SA Division, PO Box 6368, Halifax Street, Adelaide, South Australia 5000 **Phone:** (08) 8227 2255 **Fax:** (08) 8227 1211

**Email:** [sadivn@publicaccountants.org.au](mailto:sadivn@publicaccountants.org.au) **Alternatively book online:** [publicaccountants.org.au/cpe-events](http://publicaccountants.org.au/cpe-events)

Tick	Workshop title	Date	Time	Venue	Early Bird Member	Member	Non Member
<input type="radio"/>	Travel, Travel Allowances, Entertainment and Home Office Expenses	Tue 5 Jul	4.30pm – 6.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Assisting Clients with Cash Flow Issues	Thu 28 Jul	4.30pm – 6.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	SMSF Contributions	Tue 2 Aug	4.30pm – 6.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Multiple Holdings and Land Tax	Wed 10 Aug	4.30pm – 6.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Estate Administration and Planning	Tue 16 Aug	4.30pm – 6.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Superannuation Law for SMSF	Wed 24 Aug	8.00am – 10.00am	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Working with Start Ups	Tue 30 Aug	4:30pm – 6:30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Conflict: Why Early Intervention is Crucial	Wed 31 Aug	4:30pm – 6:30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Managing Change in Times of Continual Change	Fri 2 Sep	9.00am – 12.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	Quarterly Tax Update	Thu 8 Sep	8.00am – 10.00am	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	GST Update and Current Issues	Thu 8 Sep	1.00pm – 4.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	BAS Advanced Workshop	Fri 9 Sep	9.00am – 4.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$399	\$449	\$549
<input type="radio"/>	Advanced SMSF Strategy Workshop	Tue 13 Sep	9.00am – 5.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$399	\$449	\$549
<input type="radio"/>	Not-For-Profit Master Class	Wed 21 Sep	9.00am – 4.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$399	\$449	\$549
<input type="radio"/>	Succession Planning – Buying and Selling a Business	Thu 22 Sep	4.30pm – 6.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Maintain and Enhance Your Professional Practice	Fri 7 Oct	9.00am – 12.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	Choosing Business Structures	Tue 18 Oct	4.30pm – 6.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Graduate Tax Program	Thu 20 Oct	9.00am – 4.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$199	\$249	\$299
<input type="radio"/>	Preparation of Company Tax Returns	Fri 21 Oct	9.00am – 4.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$399	\$449	\$549
<input type="radio"/>	Payroll Update	Tue 25 Oct	9.00am – 12.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	SMSF Tax Planning	Wed 26 Oct	4.30pm – 6.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Practical Valuations for SMEs	Fri 28 Oct	9.00am – 4.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$399	\$449	\$549
<input type="radio"/>	Quarterly Tax Update	Tue 1 Nov	8.00am – 10.00am	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209

Tick	Workshop title	Date	Time	Venue	Early Bird Member	Member	Non Member
<input type="radio"/>	Tax Residency	Tue 1 Nov	1.00pm – 4.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	Tax Aspects of Winding Up Trusts and Partnerships	Wed 2 Nov	9.00am – 12.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	Tax Aspects of Winding Up Companies	Wed 2 Nov	1.00pm – 4.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	Charge Out Rate for Service Business	Tue 8 Nov	4.30pm – 6.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209
<input type="radio"/>	Xero and Cloud: Your Questions Answered	Wed 9 Nov	4.30pm – 6.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$29	\$39	\$49
<input type="radio"/>	SMSF Advanced Audit	Thu 10 Nov	9.00am – 5.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$399	\$449	\$549
<input type="radio"/>	HR Master Class	Thu 17 Nov	9.00am – 5.00pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$399	\$449	\$549
<input type="radio"/>	Managing Employee Terminations	Wed 23 Nov	9.00am – 12.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$230	\$265	\$329
<input type="radio"/>	SMSF What Can Go Wrong	Thu 1 Dec	4.30pm – 6.30pm	IPA Training Centre, Level 2, 422 King William St, Adelaide	\$145	\$170	\$209

Members and others are advised when reading this calendar that it is the most current version as of 30 June 2016. Information is subject to change. Please refer to the website [www.publicaccountants.org.au/cpe-events](http://www.publicaccountants.org.au/cpe-events) for all updates regarding details of sessions, times and presenters.

CONTACT DETAILS:  IPA Membership No. \_\_\_\_\_  Non-member

(Miss/Mrs/Ms/Mr) First name: \_\_\_\_\_ Surname: \_\_\_\_\_

Second Delegate: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Company & Address: \_\_\_\_\_

\_\_\_\_\_ Dietary Requirement: \_\_\_\_\_

PAYMENT. Amount Payable: \$ \_\_\_\_\_  Amex  Mastercard  Visa  Cheque

Card No: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Expiry Date: \_\_\_\_\_ / \_\_\_\_\_

Card Holders Name: \_\_\_\_\_ Signature: \_\_\_\_\_

**Cancellation Policy:** Cancellations must be advised in writing at least 5 working days prior to the activity Date. An administrative fee of 10% will be incurred for cancellations made within 7 business days prior to the course. Cancellations made within 48 hours prior to the seminar date will incur a 100% penalty for late cancellations. A refund will not be granted if a registrant fails to attend a seminar. Course materials will be sent to registrants who cancel in the non-refund penalty period. Substitutions can be made at any time without penalty.

**Conditions of Registration:** The IPA reserves the right to alter a program or presenter without notice, however, the program is intended to run as advertised. The IPA cancels seminars only when absolutely necessary, but reserves the right to do so, as well as to reschedule seminars and substitute presenters. If a course is cancelled, you may request a transfer to another course, a credit, or full refund. Please note the IPA will not be held liable for any accommodation or associated travel costs should a seminar be cancelled or rescheduled.

**Privacy Statement:** The IPA acknowledges the importance of privacy and safeguarding personal information. Any personal details provided to the IPA will be protected in line with the National Privacy Principles and the laws and regulations regarding such matters as are applicable in Australia. The IPA will not collect or monitor your personal information without consent nor will it use or disclose to others your personal details without prior authorisation unless it is required by the law or the courts; it is necessary because of the service you are using or for a service you have requested or to protect the rights or property of others. The information is being gathered to process your registration. You may withhold providing the information but this will make processing your registration difficult. The information requested is intended only for the use of the IPA and our approved service providers.

**Early Bird Rate:** Applies if registration is received at least 7 days prior to the event. Early bird rates are only available for certain events as stipulated by the IPA.

Members and Non-Members are advised when reading this calendar that it is the most current version and will be updated (or refreshed) every two weeks as additional details of seminars, times and presenters become available. Visit [www.publicaccountants.org.au/cpe-events](http://www.publicaccountants.org.au/cpe-events) to keep up to date with the latest seminar information.



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