WA CPD OCT-DEC 2016

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UNLOCK YOUR POTENTIAL

Continuing Professional Development



WA CPD OCT-DEC 2016 TAXATION

Trusts, Partnerships and The Small Business Rollover

CPE Hours: 7

Thursday 20 October, 2016

Time: 9.00am - 4.00pm The purpose of this session is to gain a detailed understanding of the taxation of trust and partnerships independently, and then how the small business rollover can provide more options in restructuring a client's affairs.

IPA Perth Location:

Level 4, 1008 Hay Street, Perth

Topics include:

A comprehensive overview of the taxation of trusts, particularly in light of the recent changes. We will discuss the key features including perpetuity period, holding period rule and reporting rules, taxation treatment of different income sources, key trigger points and consequences of resettlements and more. This session will discuss family trusts as well and the rules around losses in a family trust.

An in depth discussion of the taxation treatment of partnerships, drawing on recent case law, it will cover how to correctly determine its income and also how to correctly calculate its taxation liabilities (including GST and CGT). We will discuss the usefulness of the structure as well as its limitations.

In the Small Business Rollover session we will discuss how to make this legislative change work for your clients, trust cloning, ultimate economic ownership test and transferring assets.

Early Bird (until 13 Oct) \$360 / Regular (after 13 Oct) \$390 Member rates: Cost:

> Early Bird (until 13 Oct) \$450 / Regular (after 13 Oct) \$470 Non member rates:

Employee vs Contractor and PSI Rules

CPE Hours: 3

Date: Tuesday 1 November 2016

8.30am - 11.30am Time:

IPA Perth Location:

Level 4, 1008 Hay Street, Perth

Employees and contractors both trade their labour for money and the substance of the relationship with the employer can be incredibly similar, independent of contractual descriptions. Despite these similarities, erroneously classifying an individual as an employee or contractor could be very costly. In this seminar, delegates will learn about the indicators that can help determine whether an individual is a contractor or an employee to give you confidence that your classification is appropriate.

The seminar will also cover personal services income rules in depth and address the most common mistakes make by companies, partnerships or trusts. Delegates will learn what deductions are allowed and which are not allowed, plus the attribution of income under the PSI regime, Part IVA

and PAYG withholding.

Cost: Member rates: Early Bird (until 25 Oct) \$250 / Regular (after 25 Oct) \$265

> Early Bird (until 25 Oct) \$300 / Regular (after 25 Oct) \$325 Non member rates:

Member registrations come with a complimentary ticket to the IPA's Melbourne Cup Luncheon held

at our office, beginning immediately after the course

Deep Dive Into CGT For Accountants

Thursday 17 November 2016

Time: 9:00am - 4:00pm

IPA Perth Location:

Date:

Level 4, 1008 Hay Street, Perth

Capital Gains Tax is one of the most litigated areas of taxation because its provisions are so pervasive that complicated CGT problems can be born out of seemingly innocuous transactions. Therefore, it is imperative to know exactly when CGT is payable and to get your calculation right.

In this session we will focus on CGT events, provisions that apply in a variety of commercial and non commercial contexts, rollovers and concessions (including 15 year exemption, 50% active asset reduction; retirement exemption and rollover) and a deep dive into the order in which these concessions should be applied. We will draw from the recent case law to give delegates a deeper understanding of how to handle CGT issues that might arise in their work.

This seminar will be pitched at an advanced level, so will be appropriate for experienced accountants who would like to deepen their knowledge or brush up their skills on CGT.

Member rates: Early Bird (until 10 Nov) \$360 / Regular (after 10 Nov) \$390 Cost:

> Early Bird (until 10 Nov) \$450 / Regular (after 10 Nov) \$470 Non member rates:

Deep Dive Into Small Business Taxation

CPE Hours: 7

CPE Hours: 7

Thursday 1 December 2016 Date:

9:00am - 4:00pmTime:

Location: IPA Perth

Level 4, 1008 Hay Street, Perth

This session is designed to give delegates an in depth understanding of the tax and accounting issues that arise with small businesses. Specifically, it will cover advanced aspects of calculating taxable income in a small business; small business concessions; taxation treatment of different assets, GST and small business, FBT, and taxation issues specific to private companies.

This seminar will be pitched at an advanced level, so will be appropriate for experienced accountants who would like to deepen their knowledge or brush up their skills on small business taxation.

Cost: Member rates: Early Bird (until 24 Nov) \$360 / Regular (after 24 Nov) \$390

> Early Bird (until 24 Nov) \$450 / Regular (after 24 Nov) \$470 Non member rates:

Sensitivity Analysis to Improve the Usefulness of Forecasting

CPE Hours: 7

CPE Hours: 16

Date: Monday 24 October 2016

Time: 9:00am - 4:00pm

Location: IPA Perth

Cost:

Date:

Time:

Level 4, 1008 Hay Street, Perth

Level 4, 1008 Hay Street, Perti

Member rates:Early Bird (until 17 Oct) \$360 / Regular (after 17 Oct) \$390Non member rates:Early Bird (until 17 Oct) \$450 / Regular (after 17 Oct) \$470

economic conditions.

FOR PUBLIC PRACTITIONERS

My Public Accountant Practice Program

Thursday 13 & Friday 14 October

2016

9:00am - 5:00pm

Location: IPA Perth

Level 4, 1008 Hay Street, Perth

The My Public Accountant (MPA) Practice Program is a fully interactive workshop which provides you with the tools needed to successfully manage and grow your practice.

This practical session will focus on forecasting sensitivity analysis, to enable you to make your

forecasting more valuable in this rapidly changing environment. It will provide you with the tools

and suggestions of how to respond appropriately to changes in your business and adapt to new

The Program is designed to help members acquiring the My Public Accountant Practice Certificate to identify:

- their professional and legal obligations; and
- the business issues that lead to being a successful practitioner.

The Program is designed to provide answers to your many questions and give you tools and techniques that will help you to set up a successful practice.

You will examine the issues and arguments prepared for you by experts and work through them with fellow members in an open environment.

You will also gain familiarity with all of the statutory and professional obligations placed on a practitioner and take away programs, checklists and references that help get your practice on track to success!

It is compulsory for all new IPA MPA Practice Certificate holders to attend the MPA Practice Program

within 6 months of Certificate issue

Cost: MPA Program \$849

How To Handle Clients With Funding Problems

Date: Thursday 24 November

Time: 9:00am - 12.00pm

Location: IPA Perth

Level 4, 1008 Hay Street, Perth

This workshop is designed to give attendees some strategies for managing financial trouble within your own firm and or for when your clients hit financial difficulties. It will discuss, with real life examples, how you can manage creditors and debtors, when to stop credit, how to deal with bad debts and the benefits of credit insurance.

Afterwards, we will delve into insolvency, particularly looking at the warning signs, what you can do about it, what are the duties and role of the accountant, how to avoid clawback transactions and how to avoid a subcontractor going broke.

Cost: Member rates: Early Bird (until 17 Nov) \$235 / Regular (after 17 Nov) \$250

Non member rates: Early Bird (until 17 Nov) \$290 / Regular (after 17 Nov) \$310

CPE Hours: 3

CPE Hours: 1

SOCIAL EVENTS FOR MEMBERS

Melbourne Cup Luncheon

Tuesday 1 November Come and celebrate the race that stops a nation! The IPA is hosting a Melbourne Date:

Cup luncheon for members, prospective members, presenters and their partners. So 11.30am - 2.30pmTime: why don't you bring a few colleagues and help us celebrate. We will have a light

IPA Perth luncheon, plenty of champagne, a sweepstake and a prize for the best hat and the Level 4, 1008 Hay Street, Perth best dressed gentleman. It is a terrific opportunity to network with members and accrue

some CPE hours!

Member rates: \$25 per person or complimentary with Employee vs Contractor and PSI Rules Cost:

> Non member rates: \$40 per person

IPA WA Christmas Party

Date: Thursday 8 December, 2016 Whether you have been naughty or nice

Time: 5.00pm - 9.00pmWe'll have one waiting for you, on ice

Location: IPA Perth

Location:

So come join us for some holiday cheer Level 4, 1008 Hay Street, Perth

To celebrate Christmas and the end of the year!

Member rates: \$40 per person Cost:

> Non member rates: \$55 per person

IMPORTANT UPCOMING EVENTS

PRE REGISTER NOW TO SECURE YOUR PLACE!

2017 WA State Conference

Thursday 23 & Friday 24 March,

The 2017 State Conference will provide you with a supremely professional learning experience, allowing you to remain up to date with the latests trends and changes within

the accounting profession. Time: 9:00am Thu - 5:00pm Fri

The Vines Resort & Country Club Location:

Αll Cost:

Date:

Date:

Time:

Places are limited, so secure your place now by pre registering!

Pre registration fee (until 30 Nov) \$149 to be deducted from the total cost of the

conference

Member rates: Deluxe Package total \$949 available to pre registers

Saver Package total \$849 available to pre registers

Deluxe Package total \$1049 available to pre registers Non member rates:

Saver Package total \$999 available to pre registers

2016/17 Tax Agent Guide Roadshow

Dates below Our extremely popular Tax Agent Guide will be back in 2017, to give you

> a comprehensive update of all the tax changes you need to be aware for the forthcoming tax return season. Places before the end of the tax year are very popular

and we only have limited capacity, so secure your spot today by pre registering!

Wed 14 June 2017 Bunbury Tax Agent Guide Fri 16 June 2017 Perth Tax Agent Guide #1 Tues 20 June 2017 Kalgoorlie Tax Agent Guide Fri 23 June 2017 Perth Tax Agent Guide #2 Tues 27 June 2017 Perth Tax Agent Guide #3 Geraldton Tax Agent Guide

Thurs 29 June 2017 9.00am - 4.00pm

Location: Various

Αll Pre registration fee (until 28 Feb) \$75 to be deducted from the total. Cost:

> Member rates: Early Bird (until 31 May 2017) total \$360

Regular (after 31 May 2017) total \$390

Non member rates: Early Bird (until 31 May 2017) total \$450

Regular (after 31 May 2017) total \$470

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CPE Hours: 7

CPE Hours: 7

SOFTWARE TRAINING

Xero Accounting and Payroll

Applied Education Presenter:

Date: This one day course is available for

> registrations on the below dates: Tuesday 11 October 2016 Tuesday 15 November 2016 Tuesday 6 December 2016

9:00am - 4:00pm Time:

Location: Applied Education

Level 1, 524 Hay Street, Perth

Member rates: \$300 Non member rates: \$349

With the demand for 'cloud (live) accounting' growing exponentially, you cannot afford to be left behind. Cloud accounting is now a reality and it will change the way you run your business. There are no more lost backups, no locking out of clients from their data files and it uses live bank feeds that map directly into your ledger saving hours of data entry time coding repetitive transactions.

CPE Hours: 7

Xero Advanced

Cost:

Applied Education Presenter:

Date: This one day course is available for

> registrations on the below dates: Wednesday 12 October 2016 Wednesday 7 December 2016

9.00am - 4.00pm Time:

Location: Applied Education

Level 1, 524 Hay Street, Perth

The growing popularity of Xero is requiring bookkeepers and business owners to attain a strong command of the various functions of this versatile accounting software package. This course builds on the introductory skills from the Xero Accounting & Payroll course and it is ideal for accountants, bookkeepers and business owners who want to expand their knowledge of Xero beyond the basic functions.

Topics Covered:

- Customising Xero Invoicing, Quoting & Templates
- Advanced Items
- Customised Reporting and Layouts in Xero
- Importing and exporting data including mail merge via word and outlook

This course extends the participants basic knowledge of Microsoft Excel (version:

2010) and provides the participant with skills and knowledge to produce more

and working more effectively with existing worksheets and workbooks. Including:

page set up, find and replace, sort and filter and enhancing charts.

using the fill operation, working with logical functions, using formulae's, formatting,

This course aims to provide skills and knowledge which will allow the participant to create lookup functions, set Microsoft Excel working options, enhance charts, protect

worksheet data, perform advanced data operations using summarising, PivotTables,

course assumes an understanding of the topics and concepts covered in the Microsoft

beneficial to have a general understanding of personal computers and the Windows

data consolidations, goal seeking, and Solver, and create and use macros. This

Excel Introductory and Microsoft Excel Intermediate training courses. It would be

effective and productive workbooks. It covers formulas and function techniques, more

intricate formatting, setting complex printing options, using intricate charting features,

- Salary Packaging in Xero Motor vehicles and FBT obligations
- Advanced Payroll

operating system environment.

\$349

\$399

Cost: Member rates:

Non member rates:

CPE Hours: 7

Excel Intermediate

Applied Education Presenter:

Date: This one day course is available for

registrations on the below dates: Wednesday 26 October 2016 Wednesday 23 November 2016 Wednesday 14 December 2016

Time: 9:00am - 4:00pm

Applied Education Location:

Level 1, 524 Hay Street, Perth

\$299 Member rates: Cost:

Non member rates: \$339

Excel Advanced

CPE Hours: 7

Presenter: Applied Education

This one day course is available for Date: registrations on the below dates:

Thursday 27 October 2016 Thursday 24 November 2016 Thursday 15 December 2016

9:00am - 4:00pmTime:

Applied Education Location:

Level 1, 524 Hay Street, Perth

\$299 Cost: Member rates:

> Non member rates: \$339

CPE Hours: 7

CPE Hours: 7

BAS AGENT COURSES

Payroll Administration Course

Presenter: Applied Education

Date: Tuesday 8 November, 2016

Time: 9:00am - 4:00pm

Location: Applied Education

Level 1, 524 Hay Street, Perth

The legal obligations surrounding payroll and taxation place a significant burden on every employer – but getting on top of this vital area is easier than it seems. This Payroll Administration training course (1 day) offers an effective way of gaining the knowledge on payroll preparation and taxation procedures. You will cover: procedures and forms for new employees, allowances and withholding PAYG, payroll tax, deductions, tax rate, FBT, ATO reporting obligations, Superannuation, leave calculations, workers compensation, national employment standards and the fair work act, payroll information on BAS and activity statements. Anyone wishing to update their payroll skills or interested in gaining recognition of their payroll skills to enhance employment opportunities. No prior knowledge of payroll is

required.

Member rates: \$349 Non member rates: \$399

Salary Packaging

Cost:

Presenter: Applied Education

Date: Wednesday 9 November, 2016

Time: 9:00am - 4:00pm

Location: Applied Education

Level 1, 524 Hay Street, Perth

The common myth is that only senior executives benefit from salary packaging but nothing could be further from the truth. With the highest demand for skills seen in Australia in over 30 years, salary packaging is an essential tool for maximising the value of remuneration to the employee, while minimising the costs to the employer. This Salary Packaging training course will cover.

Topics

- Understanding the legislative framework of Fringe Benefits Tax.
- Total employment costing model and industry standards for salary packaging.
- Benefits exempt from tax.
- Employers guide to salary sacrifice superannuation.
- Concessional organisations.
- Motor vehicle salary packages.
- Remote areas and relocation benefits.
- Administration options in packaging.
- Examination of example packages.

The effect on payment summaries and employees overall tax position.

Cost: Member rates: \$300

Non member rates: \$349

Terminations

Presenter: Applied Education

Date: Thursday 10 November, 2016

Time: 9:00am - 12:00pm

Location: Applied Education

Level 1, 524 Hay Street, Perth

Termination of employment seems to cause the biggest headaches for accountants, bookkeepers and payroll officers alike. This course is designed to ensure that you are meeting your obligations to your employees upon termination of employment and to de mystify the complex rules on termination of employment. Plenty of hands on examples, access to spreadsheets from

In order to allow for the correct preparation of the BAS, it is important that all staff involved have

sufficient GST knowledge and experience. This GST & BAS training course (1/2 day) shows you

how to identify taxable supplies, GST Free supplies and input taxed supplies. It also covers the

utilises learning materials that are packed full of high quality content, step by step instructions

with visuals and plenty of practice exercises offering exceptional value to the participant.

obligations of registered entities for collection, correct record keeping and remittance of GST, as well as treatment of goods and services subject to special rules. The GST & BAS training course

Applied Education's website and time for questions and real life examples.

After completing this course you will have the confidence to tackle the most complex of

terminations.

Cost: Member rates: \$219

Non member rates: \$240

GST & BAS

CPE Hours: 3

CPE Hours: 3

Presenter: Applied Education

Date: Thursday 10 November, 2016

Time: 1:00pm - 4:00pm

Location: Applied Education

Level 1, 524 Hay Street, Perth

Cost: Member rates: \$219

Non member rates: \$240

REGISTRATION FORM & TAX INVOICE

To book please tick one or more of the Professional Development seminars listed below and forward your registration with payment to: Mail: IPA VVA Division, PO Box 7309, Cloisters Square VVA 6850 Phone: (08) 9474 1755 Fax: (08) 9474 2911

ABN 81 004 130 643

Email: wadivn@publicaccountants.org.au Alternatively book online: publicaccountants.org.au/cpd-events

Tick	Workshop Title	Date	Time	Venue	Early Bird Member	Regular Member	Early Bird non Member	Non member
0	Xero Accounting and Payroll	11 Oct 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	300	300	349	349
0	Xero Advanced	12 Oct 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	349	349	399	399
0	My Public Accountant Practice Program	13 Oct 16 & 14 Oct 16	9.00am - 5.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	849	849	NA	NA
0	Trusts, Partnerships and The Small Business Rollover	20 Oct 16	9.00am - 4.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	360	390	450	470
0	Sensitivity Analysis & Forecasting	24 Oct 16	9.00am - 4.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	360	390	450	470
0	Excel Intermediate	26 Oct 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	299	299	339	339
0	Excel Advanced	27 Oct 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	299	299	339	339
0	Employee vs Contractor & PSI	1 Nov 16	8.30am - 11.30am	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	250	265	300	325
0	Melbourne Cup Luncheon	1 Nov 16	11.30am - 2.30pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	25	25	40	40
0	Payroll Administration Course	8 Nov 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	349	349	399	399
0	Salary Packaging	9 Nov 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	300	300	349	349
0	Terminations	10 Nov 16	9.00am - 12.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	219	219	240	240
0	GST & BAS	10 Nov 16	1.00pm - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	219	219	240	240
0	Xero Accounting and Payroll	15 Nov 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	300	300	349	349
0	Deep Dive into CGT for Accountants	17 Nov 16	9.00am - 4.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	360	390	450	470
0	Excel Intermediate	23 Nov 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	299	299	339	339
0	Excel Advanced	24 Nov 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	299	299	339	339
0	How to Handle Clients with Funding Problems	24 Nov 16	9.00am - 12.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	235	250	290	310
0	Deep Dive into Small Business Taxation	1 Dec 16	9.00am - 4.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	360	390	450	470
0	Xero Accounting and Payroll	6 Dec 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	300	300	349	349
0	Xero Advanced	7 Dec 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	349	349	399	399
0	IPA Christmas Party	8 Dec 16	5.00pm - 9.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	40	40	55	55
0	Excel Intermediate	14 Dec 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	299	299	339	339
0	Excel Advanced	15 Dec 16	9.00am - 4.00pm	Applied Education, Level 1, 524 Hay Street, Perth 6000	299	299	339	339
0	WA State Conference pre registration	23 & 24 Mar 201 <i>7</i>	9.00am Thu – 5.00pm Fri	The Vines Resort and Country Club, Western Australia	149	149	149	149

0	TAG Bunbury Pre registration	14 Jun 1 <i>7</i>	9.00am - 4.00pm	TBC	75	75	75	75
0	TAG Perth #1 Pre registration	16 Jun 17	9.00am - 4.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	75	75	75	75
0	TAG Kalgoorlie Pre registration	20 Jun 1 <i>7</i>	9.00am - 4.00pm	TBC	75	75	75	75
0	TAG Perth #2 Pre registration	23 Jun 1 <i>7</i>	9.00am - 4.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	75	75	75	75
0	TAG Perth #3 Pre registration	27 Jun 17	9.00am - 4.00pm	IPA Perth, Level 4, 1008 Hay Street, Perth 6000	75	75	75	75
0	TAG Geraldton Pre registration	29 Jun 1 <i>7</i>	9.00am - 4.00pm	TBC	75	75	75	75

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

REGISTRATION FORM/TAX INVOICE

CONTACT DETAILS: O IPA Memb	O Non-member					
(Miss/Mrs/Ms/Mr) First name:			Surname:			
Phone:	Fax :	Email:				
Company & Address:						
		Dietary Require	ement:			
PAYMENT: Amount Payable:	C	Amex O Mastercard O	Visa O Cheque			
Card No:/	/	/	_ Expiry Date:	/		
Card Holders Name			Signature:			

Cancellation Policy: Cancellations must be advised in writing at least 5 business days prior to the activity date. An administrative fee of 10% will be incurred for cancellations made within 5 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/cpd-events to keep up to date with the latest seminar information.

