

NSW public practice conference

Building a firm of the future

Crowne Plaza, Hunter Valley
Thursday 11 – Saturday 13 June 2009

Public practitioners face a future of increasing change, competition and greater challenges. These pressures will create the opportunity to refresh and re-energise your practice.

This must-attend event in the public practice calendar will provide essential technical updates, new contacts and key practice management skills. Be at the forefront of your profession and ensure that you are prepared for the challenging year ahead.

Key speakers:



Michael Pascoe
Finance and economic commentator



Kieren Perkins OAM
Australian gold-medal winning Olympic swimmer



Peter Knight FCPA
Accountant and Business Coach, Knight Partners



Andrew Noolan
Partner, SBN Lawyers



Jennie Granger
Second Commissioner, Australian Tax Office

Register by 15 May and SAVE up to \$220



15 Claim up to CPD HOURS

Key benefits

- › 'Financial crisis' issues for practices and clients explored
- › The latest compliance issues explained
- › New for 2009: Café-style sessions
- › Exchange insights and network with your peers

Chairman's Welcome



Dear colleagues and friends in Public Practice,

It is almost that time of year for our annual NSW public practice conference and I encourage you to register early to take advantage of our special early-bird offer!

In 2009, the current economic climate not only presents a new set of challenges for public practitioners, but also a set of opportunities to refresh your practice. The NSW public practice conference will provide you with the tools you need to capitalise on these opportunities.

Your NSW Public Practice Committee, of which I am this year's Chair, have worked hard to enhance the Continuing Professional Development offering to our members. This year we are proud to introduce café sessions to allow you to share your experiences and learn from your peers in a relaxed environment.

Those who attended the 2008 conference can attest to its success as a source of quality CPD, and importantly to the networking opportunities presented. I have long held the view that contact with our fellow professionals is a vital and rewarding by-product of a well organised CPD event.

We are proud to once again hold our leading event at the Crowne Plaza in the Hunter Valley. The Crowne Plaza is a first class venue surrounded by picturesque vineyards and offers the scale and prestige in keeping with this high-profile event.

Your NSW Public Practice Committee exists to advocate the needs of members like you. Committee members will be on hand at the event to interact with members and will be available for discussion on any burning issues you may have.

So, register by 15 May and take advantage of the very competitive early-bird rate for up to 15 hours of quality CPD!

We look forward to seeing you there.

Sincerely,



Barry Twining FCPA
Chairman, NSW Public Practice Committee

Major national sponsor



Acknowledgements

CPA Australia would like to acknowledge the contributions made by the 2009 NSW Public Practice Task Force members. Their advice was invaluable and we would like to thank them for their time and assistance in the program development.

Barry Twining FCPA,
Sole Practitioner and Chairman,
NSW Public Practice Committee

Maguy Nakhl FCPA,
Principal, MJN Holdings and Chairman,
NSW Public Practice Task Force

Tracey Sharah CPA,
Principal, Metro Accounting

Alan Hill CPA,
Partner, Hill Mayoh

Terry Grace FCPA,
Principal, Pinnacle Business

John Giacca FCPA,
Partner, Samuelson & Giacca

Craig Rosen FCPA,
Partner, Hayes Knight

Mark Leveson FCPA,
Principal, MJL Accounting

Terry Manderson FCPA,
Principal, Acclaim Management
Accounting Taxation

HOW TO USE THIS BROCHURE

>Step 1

Find out when and where the conference is held

14

>Step 2

Choose the sessions you would like to attend

■ **Look at the complete list of sessions in 'Program at a glance'**

5

■ **Read the detailed descriptions of each day's sessions**

8 – 12

Day 1 pages 8–10

Day 2 pages 11–12

>Step 3

Register for the conference

■ **Follow the steps on the form to register your details**

■ **Choose the package that gives you the best deal**

■ **Make your payment**

14

■ **Select the sessions you wish to attend**

15

>Step 4

Contact us if you need any further assistance or information

14

Building a firm of the future

NSW public practice conference

Prepare for the challenges facing your business and clients in the year ahead by attending the 'NSW public practice conference'.

This year's packed program once again offers the proven mix of inspirational keynote sessions, informative technical updates and practice improvement tips and techniques.

In addition, the exciting new 'café sessions' will allow you to interact with your peers and share your experiences in a relaxed and open atmosphere.

Reasons why you should attend

- 1** Economic insights reveal how you and your clients can prepare for future challenges
- 2** Interact with your peers in new and exciting ways and take advantage of additional networking opportunities
- 3** Increase the performance of your practice – realign, refresh and rejuvenate
- 4** Hear fresh insights on tax avoidance, minimisation and risk from the ATO
- 5** Communicate more effectively with your clients, establish clear KPIs and drive your practice with IT



Other key speakers

- › **Anthony Johnston**
Commissioner of State Revenue and Director Revenue Advisory Services, Office of State Revenue
- › **Mark Wilkinson**
Tax and Superannuation Partner, Deloitte
- › **Greg Hayes FCPA**
Partner, Hayes Knight
- › **Steve Wearne FCPA**
Partner, Boroughs
- › **Denis Barlin CPA**
Partner, SBN Lawyers

Join our café sessions!

New to 2009, café sessions are led by a facilitator in which a group of 20 – 30 people discuss and share ideas on tackling practice management issues.

The small size of the group allows for open and relaxed discussion in a non-confronting manner.

Session numbers are limited, so book now to ensure that you don't miss out!

Note: Papers are not available for café sessions.

Program at a glance

- Accounting/technical skills
- Strategy
- Leadership
- International business
- Business and personal effectiveness

Pre-conference Thursday 11 June				
4.30pm – 5.00pm	Pre-registration			
7.00pm – 10.00pm	WD: Optional welcome dinner			
Day one Friday 12 June				
8.15am – 8.45am	Registration and arrival refreshments			
8.45am – 9.00am	Opening remarks and welcome from the chairperson			
9.00am – 10.00am	Keynote 1 ■ KN1: Economic insights – preparing small business for challenging times			
10.00am – 10.25am	Morning tea and networking break			
10.25am – 11.25am	Concurrent sessions A (Your choice from)			
	<table border="1"> <tr> <td>■ A1: Salary packaging and FBT Update</td> <td>■ A2: SMSF – who should have it?</td> <td>■ A3: Café session: Communicating financial information to your clients</td> </tr> </table>	■ A1: Salary packaging and FBT Update	■ A2: SMSF – who should have it?	■ A3: Café session: Communicating financial information to your clients
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11.30am – 12.30pm	Concurrent sessions B (Your choice from)			
	<table border="1"> <tr> <td>■ B1: State taxes update</td> <td>■ B2: Technology prophets or profits – where is IT driving your business?</td> <td>■ B3: Café session: Improving productivity through better workflow management</td> </tr> </table>	■ B1: State taxes update	■ B2: Technology prophets or profits – where is IT driving your business?	■ B3: Café session: Improving productivity through better workflow management
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12.30pm – 1.30pm	NL1: Lunch and networking break			
1.30pm – 2.30pm	Keynote 2 ■ KN2: Tax time in difficult times			
2.30pm – 2.55pm	Afternoon tea and networking break			
2.55pm – 3.55pm	Concurrent sessions C (Your choice from)			
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4.00pm – 5.00pm	Keynote 3 ■ KN3: Managing your practice: Re-evaluate + realign + rejuvenate = reward			
7.00pm – 11.00pm	CD: Official conference dinner			

Day two Saturday 13 June				
9.00am – 10.00am	Keynote 4 ■ KN4: The quest for gold			
10.00am – 10.25am	Morning tea and networking break			
10.25am – 11.25am	Concurrent sessions D (Your choice from)			
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12.30pm – 1.30pm	NL2: Lunch and networking break			
1.30pm – 2.30pm	Concurrent sessions F (Your choice from)			
	<table border="1"> <tr> <td>■ F1: Case study: Using the small business CGT concessions to minimise tax when selling a business</td> <td>■ F2: Succession planning and exit strategies</td> <td>■ F3: Café session: Selecting the right staff and creating a positive culture</td> </tr> </table>	■ F1: Case study: Using the small business CGT concessions to minimise tax when selling a business	■ F2: Succession planning and exit strategies	■ F3: Café session: Selecting the right staff and creating a positive culture
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2.30pm – 3.00pm	Sponsor presentations and prize draws			
3.00pm – 4.00pm	Keynote 5 ■ KN5: Open forum: Developing a best practice firm of the future			

Stay connected at this year's conference!

For your convenience, onsite break-out areas with internet access will be available at this year's conference. Keep in touch with clients and catch up on day-to-day business activity between sessions and during breaks

Highlight sessions

> Keynote 1

KN1 Economic insights – preparing small business for challenging times



Michael Pascoe
Finance and economic commentator
Friday 12 June
9.00am – 10.00am

Small businesses face a challenging future if current economic conditions continue or deteriorate further.

As a public practitioner and small business owner, it is imperative that you have the information you need to advise clients and develop strategies to 'recession proof' small businesses.

This keynote will provide insights into:

- > What the economy will look like for small business in the years to come
- > How small business must react to changing consumer patterns
- > How to refine your approach in challenging times and how you should change your thinking
- > What is likely to tip your balance sheets in the new financial year

Michael Pascoe is one of Australia's most respected and experienced finance and economic commentators with more than three decades in newspaper, radio, television and on-line journalism.

Perhaps best known for his 18 years as the Nine Network's Finance Editor, Michael is now Associate Editor of Alan Kohler's EurekaReport.com.au and contributes to Crikey.com.au and Channel 7's news programs.

> Keynote 2

KN2 Tax time in difficult times



Jennie Granger
Second Commissioner,
Australian Taxation Office
Friday 12 June
1.30pm – 2.30pm

This presentation will examine the ATO's focus for Tax Time 2009 and the implications of the economic downturn for the ATO's compliance priorities. An exclusive preview of the ATO's 2008-09 compliance program including the key tax risks and current compliance concerns will also be offered.

Jennie will outline the ATO's approaches to a range of tax risks including:

- > Rental properties
- > Dividends and interest
- > Sale of investments and tax schemes
- > Salary packages of executives and directors
- > Work expense claims

The session will also include early Tax Office views of new measures introduced in the May 2009 budget from the perspective of their impact on the work of tax practitioners.

Jennie was appointed as Second Commissioner Compliance in early September 2002. As leader of the ATO's Compliance Program, Jennie leads about half the workforce of over 22,000 staff, most of whom are located in regional offices across Australia.

Prior to her appointment as Second Commissioner, Jennie was Deputy Commissioner of Personal Tax. She also worked in traditional Tax Technical areas of the ATO, the Child Support Agency, Superannuation and led the International Tax Division.

> Keynote 3

KN3 Managing your practice: Re-evaluate + realign + rejuvenate = reward



Peter Knight FCPA
Accountant and Business Coach,
Knight Partners
Friday 12 June
4.00pm – 5.00pm

This is a hands on session looking at practice management and how to achieve superior performance, utilising diagnostic tools and practice specific KPIs designed for small to medium accounting firms.

This keynote will assist you in analysing your practice and will provide you with the 'take home' tools to better understand the performance of your practice.

- > Key strategies to improve your 'average hourly rate'
- > Focus on key areas of profitability, liquidity and growth
- > KPI reporting module to assist in monitoring performance
- > Strategies to improve practice financial performance

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Peter now heads up Knight Partners, a niche accounting and consulting practice, which provides financial and strategic management, accounting, tax and business advice. He is a former President of CPA Australia, NSW Division and currently serves on the National Board of Public Practice.

Highlight sessions (cont)

> Keynote 4

KN4 The quest for gold



Kieren Perkins OAM
Australian gold-medal winning
Olympic swimmer

Saturday 13 June
9.00am – 10.00am

Kieren Perkins is a remarkable man with a remarkable story. Kieren's domination of the 1500 metre freestyle looked to be over during the run up to the Atlanta Olympics.

He barely made the Olympic team and then qualified for the 1500 metre final with the slowest time. It was in the race he proved his incredible strength, determination and athleticism to the world. Blitzing the field, he won a truly memorable gold medal.

Kieren's story of motivation, determination and success will inspire you to achieve your own personal goals.

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pay by 15 May and
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> Keynote 5

KN5 Open forum: Developing a best practice firm of the future



Peter Docherty
Director Public Practice,
CPA Australia



Pamela Pointon CPA
Senior Consultant,
United Professionals of Australia



Greg Hayes FCPA
Partner, Hayes Knight
Saturday 13 June
3.00pm – 4.00pm

This interactive panel forum will discuss the key issues facing practitioners today and will flag what lies beyond the horizon. A panel of experts will discuss a number of aspects involved in running a practice including:

- > New Professional Standards legislation
- > Tackling the day-to-day challenges of managing your practice
- > Update on CPA public practice activities
- > Becoming a multidisciplinary practice and seizing new service opportunities

Ultimately, the agenda is yours to own in raising the most important issues. So don't miss this opportunity to put forward your issues as well as share and exchange ideas with your fellow industry professionals.

Win practice management software valued at \$4,920!

The Reckon Elite Accountants Pack includes a suite of easy to use programs underpinned by a single database – helping your practice deliver a real reduction in data entry to minimise duplication of tasks.

The 3 year subscription to the Accountants Pack includes:

- Reckon Elite Practice Management
- Reckon Elite Tax (including all ELS forms)
- Reckon Elite Ledger
- Reckon Elite Assets
- Reckon Elite AdvanceDocs

With Reckon Elite you will also benefit from clever integration with other Reckon products, such as QuickBooks, allowing you to provide a superior service to your clients.

Make sure you complete an entry form at the Reckon Exhibition Stand for your chance to win!

The prize will be drawn and announced on the last day of the conference.

Reckon

PRE-CONFERENCE

Thursday 11 June

4.30pm – 5.00pm Pre-registration

7.00pm – 10.00pm

WD Optional welcome dinner

The members of the New South Wales Public Practice Committee cordially invite you to join them for the optional welcome dinner to kick start this year's event.

For convenience, this year the dinner will be held on-site at the Crowne Plaza, in the relaxed setting of the Grapevine Bar.

It will once again provide a great opportunity to catch-up with friends, make new acquaintances and meet the Public Practice Committee before the conference gets under way.



DAY ONE

Friday 12 June

8.15am – 8.45am Registration and arrival refreshments

8.45am – 9.00am Opening remarks and welcome from the chairperson

9.00am – 10.00am **Keynote 1**

KN1 Economic insights – preparing small business for challenging times

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About the presenter

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10.00am – 10.25am Morning tea and networking break

10.25am – 11.25am **Concurrent sessions A**

A1 Salary packaging and FBT Update

Alison Stevenson Tax Manager, William Buck

Salary packaging is an effective tool that employers can use to ensure employees receive the maximum benefit from their remuneration without increasing the employers cost. It can be a confusing area however, especially ensuring the correct administration is adopted.

This session will take a practical look at structuring salary packaging and the associated FBT cost for your clients. Issues to be discussed include:

- › Maximising the benefit to the employee and minimising the employers costs
- › How to get the administration right and not turn into a nightmare
- › The ATOs approach and compliance issues
- › Tips and traps when advising your clients

OR

A2 SMSF – who should have it?

Mark Wilkinson Tax and Superannuation Partner, Deloitte

Self-managed superannuation funds (SMSFs) are a proven vehicle for growing retirement funds. Yet it is crucial that you identify its suitability for your clients. This session will explore:

- › How financially sophisticated are the potential members / trustees ?
- › The decision-making process – what advantage will the SMSF structure offer you?
- › Financial benefits that are unique to SMSFs
- › Legal, operational and auditing considerations of note
- › Will the SMSF be used as part of the client estate plan?

10.25am – 11.25am **Concurrent sessions A (cont)**

A3 **Café session: Communicating financial information to your clients**

Effectively communicating financial information is a critical skill to master for any public practitioner. The discussions in this café session will centre around key factors and methods that can contribute to more effective communication with your clients.

11.30am – 12.30pm **Concurrent sessions B**

B1 **State taxes update**

Anthony Johnston
Commissioner of State Revenue and Director Revenue Advisory Services, Office of State Revenue

This session will bring you up to date with recent legislative and administrative changes in relation to state taxes, as follows:

- › Payroll tax
- › Land tax and other duties
- › The move from land rich to landholder duty
- › Budget changes

11.30am – 12.30pm **Concurrent sessions B (cont)**

B2 **Technology prophets or profits – where is IT driving your business?**

Paul MacNeill
Systems Consultant, Pro.Integrations

Utilising the right IT systems in business can deliver increased profits, yet is still the forgotten frontier of business strategy.

With technology and software at the corner stone of every modern business, having the right solution is critical in delivering profits from productive output. Even where IT is not your forte, you need not wait for a lesson from the prophets, this session will show how simple changes can convert to profound results.

This informative session will highlight:

- › The driving factors behind efficient systems and simple steps to perform an IT health check of your systems
- › Increasing efficiencies in a paper-less environment
- › Managing your costs and protecting your assets

OR

B3 **Café session: Improving productivity through better workflow management**

Improving workflow and efficiency is the key to meeting the demands of today's increasing workloads. Improved workflow in your practice ultimately improves productivity, profit and lifestyle.

This café session will discuss various methodologies and systems that you can implement to achieve this goal.

12.30pm – 1.30pm **NL1: Lunch and networking break**

1.30pm – 2.30pm **Keynote 2**

KN2 **Tax time in difficult times**

Jennie Granger
Second Commissioner, Australian Taxation Office



This keynote will examine the ATO's focus for Tax Time 2009 and the implications of the economic downturn for the ATO's compliance priorities. An exclusive preview of the ATO's 2008-09 compliance program including the key tax risks and current compliance concerns will also be offered.

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2.30pm – 2.55pm **Afternoon tea and networking break**

Café session numbers are limited. Book now!

DAY ONE

Friday 12 June

2.55pm – 3.55pm Concurrent sessions C

C1 Trusts – current issues with trusts that impact on your practice

Andrew Noolan
Partner, SBN Lawyers

Trusts are commonly used as asset protection vehicles, and as structures that provide for flexibility in distributing income. To properly administer a trust, or advise a client, you need to be aware of both new case law and legislative changes that impact on your use of a trust.

In this session Andrew will cover:

- › The final changes to family groups and family trust elections
- › Traps in distributing capital gains
- › Some capital gains tax anomalies
- › The demise of cloning of trusts and the current alternatives

OR

C2 Anti-money laundering – a guide to the updated legislation and your obligations

Ian Fargher CPA
Area Manager, Fraud Disputes Investigations

With Tranche 2 of the Anti-Money Laundering/Counter Terrorism Financing (AML/CTF) legislation due to extend obligations to accountants, solicitors, jewellers and real estate agents this session provides an update on how to avoid significant potential penalties, and will address:

- › What is AML/CTF? Why are we interested?
- › Australia and the international imperative
- › Assurance under the risk-based approach
- › Opportunities and obligations for practitioners
- › Governance – what Austrac (the regulator) expects
- › Your AML/CTF program and Know Your Customer

2.55pm – 3.55pm Concurrent sessions C (cont)

C3 Café session: KPIs for accounting practices

Selecting the right KPIs for your business will ensure that you stay on track in meeting your business and personal goals and ultimately achieve business success.

The discussions in this café session will address not only the selection of the right KPIs for your business, but also how to move from strategy to implementation.

The official conference dinner once again promises to be a night of fine food, wine and great live entertainment. Network with your peers, establish new contacts and dance the night away all in the surrounds of the beautiful Crowne Plaza, Hunter valley.

4.00pm – 5.00pm Keynote 3

KN3 Managing your practice: Re-evaluate + realign + rejuvenate = reward

Peter Knight FCPA
Accountant and Business Coach,
Knight Partners



This is a hands on session looking at practice management and how to achieve superior performance, utilising diagnostic tools and practice specific KPIs designed for small to medium accounting firms.

This keynote will assist you in analysing your practice and provide you with the 'take home' tools to better understand the performance of your practice.

- › Key strategies to improve your 'average hourly rate'
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7.00pm – 11.00pm **CD:** Official conference dinner

DAY TWO

Saturday 13 June

9.00am – 10.00am **Keynote 4**

KN4 The quest for gold

Kieren Perkins OAM
Australian gold-medal winning Olympic swimmer



Kieren Perkins is a remarkable man with a remarkable story. Kieren's domination of the 1500 metre freestyle looked to be over during the run up to the Atlanta Olympics.

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10.00am – 10.25am Morning tea and networking break

10.25am – 11.25am **Concurrent sessions D**

D1 Superannuation strategies – tax structuring and wealth maximising

Murray Wyatt FCPA
Director, Morrows Financial Services

This session will provide you with an update on recent and relevant changes to the superannuation and taxation compliance regime and how to practically apply these changes.

- › Insurance in SMSFs
- › Estate planning
- › An update on the state of play

OR

D2 Small business CGT concessions update

Steve Wearne FCPA
Partner, Boroughs

This session is designed to keep public practitioners up to date on recent amendments to the small business CGT concessions. Issues to be discussed include:

- › Amendments to the small business entity, net asset value and active asset tests
- › The interaction between the small business concessions and deceased estates
- › The interaction of the small business roll-over and the retirement exemption
- › Access to the retirement exemption through interposed entities

OR

D3 Café session: Using IT to improve your workflow

IT systems are the corner stone of every modern business and having the right systems are essential to ensure that your business remains efficient and secure.

This café session will explore how leading practices are harnessing the latest technologies to improve efficiency, profitability and client service.

11.30am – 12.30pm **Concurrent sessions E**

E1 Estate planning – the practicalities of effective structuring

Denis Barlin
Partner, SBN Lawyers

This session will address the practicalities of business structuring, asset protection and how to effectively manage the estate planning process to ensure that your client's assets are administered to the appropriate people at the appropriate time.

Key areas of focus will include:

- › Understanding the pros and cons of the various structures available
- › Strategies to use in various situations
- › Developing a structure to maximise asset protection
- › Practical steps in preparing to pass-down an estate
- › Protecting against possible claims against an estate

OR

E2 Top ten tax tips for tough times

Mark Morris CPA
Senior Tax Counsel, CPA Australia

Businesses grappling with the current financial crisis can minimise exposures and exploit opportunities if they adopt the correct tax planning strategies.

In doing so practitioners may have to focus on tax provisions seldom used during boom times, identify tax strategies which ameliorate the impact of the downturn and apply tax concessions which may be potentially accessed by their clients.

This session lists various traps and opportunities you should be aware of in advising SMEs on how to maximise their tax position during tough times, the application of which will be practically illustrated through the use of case studies.

DAY TWO

Saturday 13 June

11.30am – 12.30pm **Concurrent sessions E (cont)**

E3 **Café session: Getting the most out of your pricing structures**

With many clients demanding upfront costs associated with business services, many public practitioners are faced with the difficulties of calculating the correct fee. The current economic climate has created an even more competitive environment which further increases the focus on pricing.

This café session will investigate how to effectively calculate administration fees, fixed-price agreements and how to structure pricing effectively.

12.30pm – 1.30pm **NL2: Lunch and networking break**

1.30pm – 2.30pm **Concurrent sessions F**

F1 **Case study: Using the small business CGT concessions to minimise tax when selling a business**

Andrew Noolan
Partner, SBN Lawyers

This session will show, via case study examples, how to deal with some of the practicalities of applying the small business CGT concessions when selling a business (or an interest in a business).

- › Understanding the \$6 million test
- › Working through the \$2 million turnover test including consideration of connected entities
- › Determining whether an active asset is being disposed of
- › Determining whether the 80% test needs to be satisfied for shares
- › The practical process of applying the 15 year retirement exemption and the retirement exemption for an individual vs an entity
- › How to effectively access the funds

1.30pm – 2.30pm **Concurrent sessions F (cont)**

F2 **Succession planning and exit strategies**

Greg Hayes FCPA
Partner, Hayes Knight

The demographic of the practitioner market will see many practitioners commence their transition to retirement over the coming years. Using case studies, this session will discuss perspectives from the buyer and seller when a practice is sold and the effective strategies that will assist you to plan a smooth transition to retirement.

- › Understanding the practitioner market
- › Due diligence – what the market is looking for
- › What is being paid
- › Assessing your options – sell or change your business
- › Developing and implementing your succession plan

OR

F3 **Café session: Selecting the right staff and creating a positive culture**

Few management activities will add greater value to your practice than hiring the right people. This café session will discuss strategies to meet the challenges faced by practitioners to recruit the right staff and create a successful culture.

2.30pm – 3.00pm **Sponsor presentations and prize draws**

Stay connected at this year's conference!

For your convenience, onsite break-out areas with internet access will be available at this year's conference. Keep in touch with clients and catch up on day-to-day business activity between sessions and during breaks

3.00pm – 4.00pm **Keynote 5**

KN5 **Open forum: Developing a best practice firm of the future**

This interactive panel forum will discuss the key issues facing practitioners today as well as flag what lies beyond the horizon. Our panel of experts will discuss a number of aspects involved in running a practice including:

- › New Professional Standards legislation
- › Tackling the day-to-day challenges of managing your practice
- › Update on CPA public practice activities
- › Becoming a multidisciplinary practice and seizing new service opportunities

Ultimately, the agenda is yours to own in raising the most important issues. So don't miss this opportunity to put forward your issues as well as share and exchange ideas with your fellow industry professionals.



Peter Docherty
Director Public Practice,
CPA Australia Ltd



Pamela Pointon CPA
Senior Consultant,
United Professionals of Australia



Greg Hayes FCPA
Partner, Hayes Knight

PACKAGES

> Full conference package

15 Claim up to
CPD HOURS

Entitles attendees to:

- > Five keynote sessions
- > Six technical sessions
- > All lunch, morning and afternoon networking breaks†
- > One full set of available presenter papers

Group full conference package

Group full conference packages are also available for 3+ delegates from one organisation. The package entitles attendees to the benefits of the full conference package.† Please photocopy the registration page and submit your forms together.

> One-day package

8 Claim up to
CPD HOURS

Entitles attendees to:

- > Attend all keynote sessions on the selected day
- > A choice of concurrent sessions on the selected day
- > Lunch, morning and afternoon networking breaks on the selected day†
- > One full set of available presenter papers for the selected day

> Partial registration options

Allows you to purchase your single sessions, welcome dinner and official conference dinner individually.

† Official conference dinner and welcome dinner tickets must be purchased separately

GENERAL INFORMATION

Venue and date

Crowne Plaza, Hunter Valley

Thursday 11 – Saturday 13 June 2009

Early-bird registrations

Register and pay by 15 May to save on your registration fee.

Confirmation of registration

Upon registering, you will be issued with a confirmation letter and tax invoice. Please check this information.

If you have any discrepancies or you have not received confirmation of registration by Monday 9 June 2009, please call CPA Australia Administration on 1300 857 705. No refunds will be processed after this date.

Entrance to NSW public practice conference will be by confirmation letter only. For security purposes, each attendee will be required to wear their personalised name tag at all times.

Closing date for registrations

Registrations for NSW public practice conference close on Monday 9 June 2009.

Registration changes and substitutions

Attendance to NSW public practice conference is fully transferable. Attendee substitutions can be made at any time prior to the event if a registrant is unable to attend the conference. Session changes can be made subject to availability. Any changes must be made in writing.

Please email changes to MA.Events@cpaaustralia.com.au by Monday 9 June 2009 to ensure a revised confirmation letter can be mailed or faxed to you.

Once the conference has commenced, any changes will need to be made at the onsite registration desk.

Continuing professional development (CPD) hours

If you are a CPA Australia member registering for any sessions at the conference, it is important to include your membership number to ensure your CPD Hours are recorded against your CPA records.

Attendees of the conference may claim up to 15 CPD hours for attending the full three days. Partial CPD hours are accrued on an actual attendance basis.

Dress

Business dress for the conference is applicable. As meeting room temperatures may vary, we suggest you wear layered clothing to make sure you are comfortable.

Accommodation

NSW public practice conference attendees are eligible to receive discounted accommodation rates at the Crowne Plaza Hunter Valley. Please advise you are attending the 'NSW public practitioners' conference to obtain the discounted rate.

To book your accommodation at the Crowne Plaza Hunter Valley, visit www.crowneplaza.com/hunintervalley, and enter the conference dates and the block code: 'CPA' and complete all necessary details or call direct on (02) 4991 0900.

Check in at 3.00pm
Check out at 11.00am

Accommodation rates

All accommodation rates are as follows:

Crowne Plaza Hunter Valley

Room: \$170 per night includes one breakfast
Suite: \$270 per night includes one breakfast

Presenter papers

Presenter papers (subject to submission by presenters), will be handed out prior to each session.

Special dietary requirements

If you have special dietary requirements please indicate your needs on the registration form.

Unemployed and retired member discount

Unemployed members of CPA Australia will be eligible to a 40% reduction of registration fees excluding the business luncheon upon submission of CentreLink and/or Social Security documentation. Retired members also receive the same discount, please state this on the registration form and it will be verified at the time of booking.

CPA Australia's responsible service of alcohol statement

CPA Australia holds a Responsible Service of Alcohol Policy and has a legal and social obligation to ensure the safety of all participants during CPA Australia functions. For further details on the full policy, please check with onsite staff.

Disclaimer of liability

CPA Australia reserves the right to alter any part of this program at any time without notice.



Registration form | NSW public practice conference

Fill out sections 1 to 4 of this form and mail/fax it to us with your full payment by Thursday 4 June

Source code: 0908 83 MA

Activity code: NS091143

FOUR EASY WAYS TO REGISTER

Fax:
1300 658 156

To pay by credit card

Mail:
Member Administration
CPA Australia Ltd, Event Registration
GPO Box 2820, Melbourne VIC 3001

To pay by credit card, or cheque

Phone:
1300 857 705

To pay by credit card

Online:
cpaustralia.com.au/cpd
Receive instant confirmation
of your registration

To pay by credit card **FAST & CONVENIENT**

Event date: 11 – 13 June 2009

**Venue: Crowne Plaza,
Hunter Valley, NSW**

**Enquiries: Visit
cpaustralia.com.au/cpd
or call 1300 857 705**

1 Provide your details

Fill out ALL of the sections below clearly using a dark pen to register successfully

NOTE: Individual forms must be completed for each attendee – photocopies are accepted and remember to keep a copy for your reference.

Are you a CPA Australia member?

Yes → if known supply your CPA Australia member ID

No → if known supply your CPA Australia non-member ID

Your contact details

Mr Ms → Other, provide details

First name _____ Surname _____

Company / Organisation → If applicable _____

Position _____

Mailing address: Business Private _____

STATE _____ POSTCODE _____

Phone _____ Fax _____

Email → to which your confirmation information will be sent _____

Do you have any special requirements? → e.g. dietary

No Yes → provide details

2 Choose a package that gives you the best deal

Please refer to package information on page 13

Individual registration option		Early bird Register and pay by 15 May	Standard Register and pay after 15 May	Qty	Total payable
<input type="checkbox"/> Full conference package	Member	<input type="checkbox"/> \$990	<input type="checkbox"/> \$1,155		\$
	Non-member	<input type="checkbox"/> \$1,100	<input type="checkbox"/> \$1,320		\$
<input type="checkbox"/> One-day package <input type="checkbox"/> 12 June <input type="checkbox"/> 13 June	Member	<input type="checkbox"/> \$550	<input type="checkbox"/> \$550		\$
	Non-member	<input type="checkbox"/> \$660	<input type="checkbox"/> \$660		\$
<input type="checkbox"/> Group full conference package (3+ from one organisation)	Member	<input type="checkbox"/> \$880	<input type="checkbox"/> \$990		\$
	Non-member	<input type="checkbox"/> \$880	<input type="checkbox"/> \$990		\$
Partial registration options					
<input type="checkbox"/> Single concurrent or keynote session			<input type="checkbox"/> \$121		\$
<input type="checkbox"/> WD: Welcome dinner on Thursday 11 June			<input type="checkbox"/> \$77		\$
<input type="checkbox"/> OD: Official conference dinner on Friday 12 June			<input type="checkbox"/> \$110		\$
Total amount (all listed prices above are inclusive of GST)					\$

3 Make your payment

Full payment is required for your registration to be processed.
Make all cheques payable to 'CPA Australia Ltd'.
A Tax invoice will be issued with your confirmation notice.

Card number

_____|_____|_____|_____|_____|_____|_____|_____|

Expiry date

____/____

Cardholder's name

Total amount

\$ _____

Signature

Payment method

- Cheque payable to CPA Australia Ltd
- AMEX
- Visa
- Mastercard
- Diners

Privacy Statement | CPA Australia Ltd (CPA Australia) (ABN 64 008 392 452) protects the privacy and security of information provided by you. By completing this form, you agree to the use of your personal information by CPA Australia: to process your registration form; to contact you about our products and services; to disclose to third parties providing services to CPA Australia; and for internal purposes. For more information on our privacy policy visit www.cpaustralia.com.au. CPA Australia processes payments for CPD Events using online technologies. All transactions processed by CPA Australia meet industry security standards to ensure your details and payments are protected. If you do not wish to receive further CPD information via mail, please tick the box and fax back to CPA Australia on 1300 787 673.

Terms and Conditions of Registration | 1 CPA Australia Ltd (CPA Australia) reserves the right to alter this program or presenter(s) without further notice, however the program is intended to run as advertised. CPA Australia reserves the right to cancel this activity due to insufficient numbers – registrants will be notified if this occurs and payment refunded in full. 2 Registrations for CPD activities must be accompanied by full payment. Registrants will be liable for payment in the event of non-attendance unless cancellation or request for transfer is made in accordance with clause 3 below. 3 Cancellations or transfers must be advised in writing and received by CPA Australia at least 5 working days prior to the activity. Refunds will not be granted if a registrant fails to attend a workshop, or cancels/ transfers within 5 working days of the activity. Substitutions may be made at any time subject to the applicable registration rate and additional payment may be required.

4 Select the sessions you wish to attend

Please tick only one concurrent session for each time slot

Pre-conference Thursday 11 June

7.00pm – 10.00pm

- WD:** Optional welcome dinner

Day one Friday 12 June

9.00am – 10.00am

- KN1:** Economic insights – preparing small business for challenging times

10.25am – 11.25am Concurrent sessions A

- A1:** Salary packaging and FBT Update

- A2:** SMSF – who should have it?

- A3** Café session: Communicating financial information to your clients

11.30am – 12.30pm Concurrent sessions B

- B1:** State taxes update

- B2:** Technology prophets or profits – where is IT driving your business?

- B3** Café session: Improving productivity through better workflow management

12.30pm – 1.30pm

- Lunch and networking break

1.30pm – 2.30pm

- KN2:** Tax time in difficult times

2.55pm – 3.55pm Concurrent sessions C

- C1:** Trusts – current issues with trusts that impact on your practice

- C2:** Anti-money laundering – a guide to the updated legislation and your obligations

- C3:** Café session: KPIs for accounting practices

4.00pm – 5.00pm

- KN 3:** Managing your practice: Re-evaluate + realign + rejuvenate = reward

7.00pm – 11.00pm

- CD:** Official conference dinner

Member name

ID

Organisation

Day two Saturday 13 June

9.00am – 10.00am

- KN4:** The quest for gold

10.25am – 11.25am Concurrent sessions D

- D1:** Superannuation strategies – tax structuring and wealth maximising

- D2:** Small business CGT concessions update

- D3:** Café session: Using IT to improve your workflow

11.30am – 12.30pm Concurrent sessions E

- E1:** Estate planning – the practicalities of effective structuring

- E2:** Top ten tax tips for tough times

- E3:** Café session: Getting the most out of your pricing structures

12.30pm – 1.30pm

- Lunch and networking break

1.30pm – 2.30pm Concurrent sessions F

- F1:** Case study: Using the small business CGT concessions to minimise tax when selling a business

- F2:** Succession planning and exit strategies

- F3:** Café session: Selecting the right staff and creating a positive culture

3.00pm – 4.00pm

- KN5:** Open forum: Developing a best practice firm of the future

