



knowledge^xchange conference 2019

The Star, Gold Coast

16-19 June 2019

2.5 impactful conference days for
professional accountants & advisers





Welcome

Knowledge^xchange 2019 brings together the leadership teams from public practice across Australia - accountants, advisers, auditors, SMSF professionals - for 2.5 impactful days.

We immerse participants in the conference philosophy - innovation and technical excellence - to help drive the professional development of participants and the performance of their firms.

The agenda works with leading professionals across key development areas in interactive and illustrative ways. The conference goes deeper than mere technical sessions, taking hold of themes, debating and working them.

And, we'll have some fun.

We'll look forward to welcoming you at the Gold Coast.



Lisa Armstrong

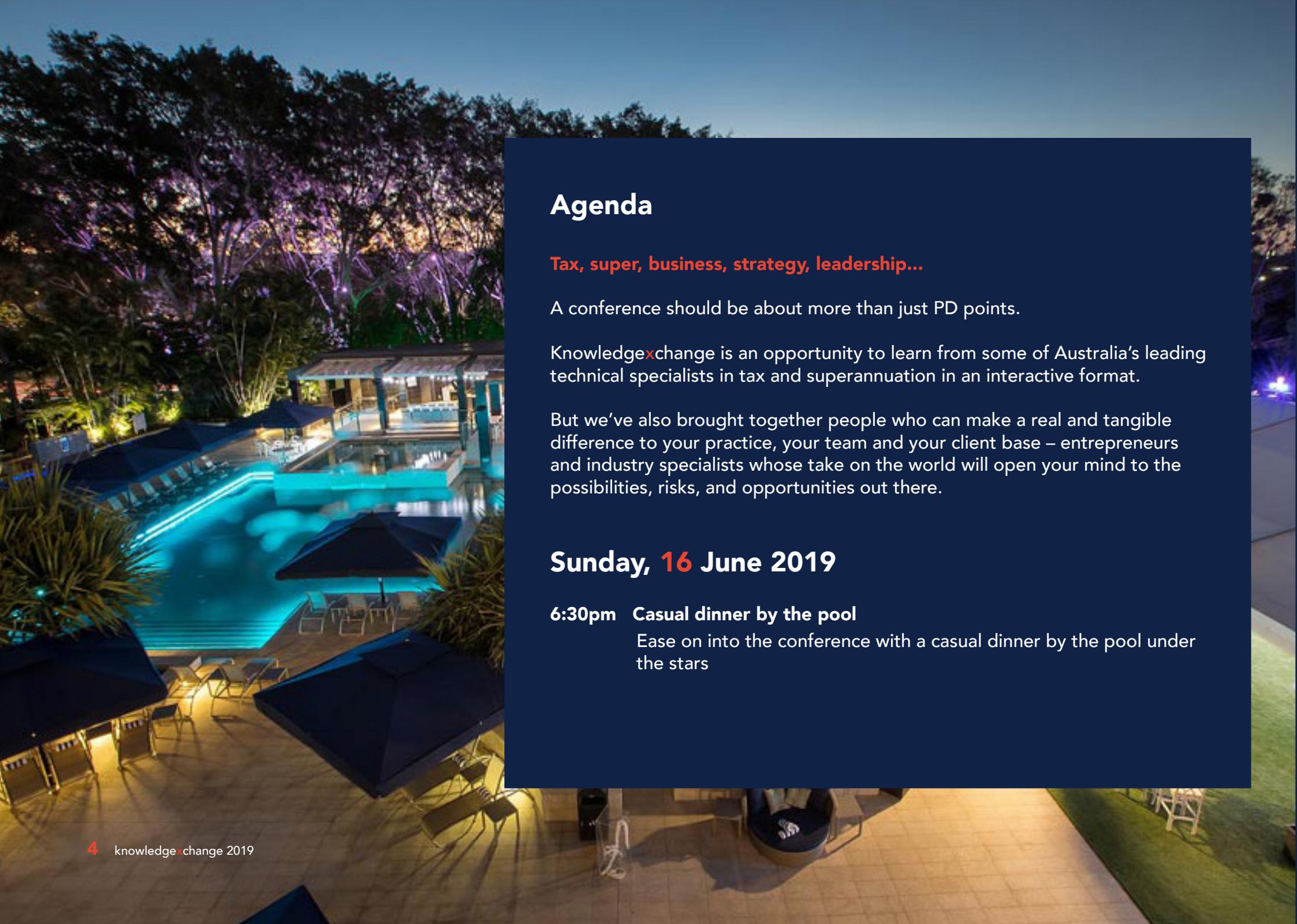
Managing Director | Knowledge Shop

Who will benefit from knowledgexchange?

Accountants, advisers, auditors, SMSF professionals who want to take a step beyond the every day.

20.5 PD hours
15.25 active hours





Agenda

Tax, super, business, strategy, leadership...

A conference should be about more than just PD points.

Knowledge^xchange is an opportunity to learn from some of Australia's leading technical specialists in tax and superannuation in an interactive format.

But we've also brought together people who can make a real and tangible difference to your practice, your team and your client base – entrepreneurs and industry specialists whose take on the world will open your mind to the possibilities, risks, and opportunities out there.

Sunday, 16 June 2019

6:30pm Casual dinner by the pool

Ease on into the conference with a casual dinner by the pool under the stars

Monday, 17 June 2019

08:30 am	09:00 am	Registration	
09:00 am	09:15 am	Let's go...welcome and opening	
09:15 am	10:30 am	<p>ATO & Panel, The Role Of The Practitioner Featuring Assistant Commissioner Adam Kendrick and our panel</p> <p>Is there a difference between what you can do and what you should do? Tax Commissioner Chris Jordan previously stated that when it came to work related deductions, some tax agents were "deliberately scamming or cheating the system." And to be fair, we all know some who do. But, is everyone to be tarred with the same brush? And, where do the boundaries lie between what the law allows, and what the ATO wants? Assistant Commissioner Adam Kendrick joins us for this interactive discussion.</p>	
10:30 am	11:00 am	Morning tea	
11:00 am	12:00 pm	<p>Are You Delivering What The Market Wants? Andrew Inwood, Principal/Founder, Core Data</p> <p>Understanding the market within which you compete is a critical foundation for business success. Andrew's unique insights into client demographics and what clients really want are essential for any aspirational firm that wants to know how they stand and how to position themselves for the future.</p>	
12:00 pm	01:00 pm	Lunch @ marketplace	
		Stream 1	Stream 2
01:00 pm	01:45 pm	<p>The Main Residence Exemption Dilemma Michael Carruthers, Tax Director, Knowledge Shop</p> <p>A post-election wrap up on the main residence exemption. What is happening with the rules and where do clients stand?</p>	<p>Next Gen Clients - Emerging Models and What Your future Client Looks Like</p> <p>What makes an investor choose one innovative business over another? We explore the practical differences that may make or break an innovative company.</p>

Monday, 17 June 2019

		Stream 1	Stream 2
01:45 pm	02:30 pm	<p>The debt bomb: The dangers of writing off and forgiving debts Karen Vella, Director, Green Square Tax</p> <p>One of the most common questions raised by practitioners and one of the most poorly understood areas of tax. Karen explores the often complex rules relating to the forgiveness of debts and the unexpected outcomes that can occur.</p>	<p>SMSF reporting 2 years on Belinda Black, Director, SMSF Client Engagement, ATO</p> <p>We are now almost 2 years into the new reporting regime for SMSFs. Belinda takes us through the problem areas encountered, what practitioners are getting wrong, and the risk areas the ATO is focusing on. We'll explore the penalty regime, the number of funds made noncomplying and the process to get to that point, and the issues created by the centralisation of information for the transfer balance cap.</p>
02:30 pm	03:00 pm	Afternoon tea	
03:00 pm	04:00 pm	<p>Artificial Intelligence and our future Prof. Fang Chen, Executive Director Data Science, Distinguished Professor, University of Technology Sydney</p> <p>Our leading global expert on artificial intelligence explores the very practical ways that AI is changing business as we know it. This is not something for the future but how AI is integrating and improving everyday business processes. This is an essential session for any adviser to understand not only what is coming but what is possible now and in the future.</p>	
04:00 pm	05:00 pm	<p>Marketing your practice in the age of social media Baz Gardner, Director, The Social Adviser</p> <p>Social Media is no longer a new 'concept' and yet very few accounting firms have taken the simple steps to use this medium effectively to grow their businesses. Baz dispels the myths and will open your eyes to the simple power of scaling your communication. Accountants typically struggle to not only deeply explain their value to clients, but also to tell their story and during this session, he will help you change that.</p>	
05:00 pm	07:00 pm	Twilight drinks and canapes in the marketplace	

Tuesday, 18 June 2019

09:00 am	10:00 am	The State of Things to Come Emmanuel Calligeris – Chairman Investment Committee, Easton Wealth To invest or not to invest. If you're advising clients on their business strategy, this essential economic update will articulate where the market is headed and where the opportunities and risks lie for clients.	
10:00 am	11:00 am	Where to now for financial reform? The "Father of Financial Reform," the Hon. Bernie Ripoll Regardless of who won the election, there is more change to come for accountants and advisers. Many of the issues that emerged during the election campaign were not new. Bernie explores the areas most likely to change, and the machinations that determine whether a policy idea becomes a reality.	
11:00 am	11:30 am	Morning tea	
		Stream 1	Stream 2
11:30 am	12:15 pm	Division 7A: Starting again Michael Carruthers, Tax Director, Knowledge Shop Division 7A is set to undergo a seismic shift, changing many key aspects of how practitioners approach the rules. We explore where the changes are up to, complications that are likely to arise and steps that can be taken to manage the process.	What if...Death benefits and super strategies Facilitated by Peter Johnson, SMSF Expert What if something happened to your client today? Our specialist panel explore the strategies and the planning required to deliver the most effective outcome for your client and their beneficiaries.
12:15 pm	01:00 pm	Leaving trust distributions unpaid Michael Carruthers, Tax Director, Knowledge Shop When trust distributions are left unpaid this can cause some problems regardless of whether this is done for tax planning or is just a commercial decision to leave the money where it's needed most. We explore the issues that need to be considered and the practical steps that can be taken to minimise risk.	

Tuesday, 18 June 2019

01:00 pm	02:00 pm	Lunch
02:00 pm	03:00 pm	Competitive Tactics: Motivation, Performance and Passion Andrew Gaze, Coach, Olympian, basketball legend Andrew Gaze is a basketball legend, Olympian, and coach. He's passionate about what he does and is 'all in' mentally and physically. He's also evolved from a leading player, to captain, to coach. Andrew explores what it takes to perform at a leading level and maintain that performance, and how to motivate others to do the same.
03:00 pm	03:30 pm	Afternoon tea
03:30 pm	04:15 pm	Are Partners and Directors Paying Less Tax Than What the ATO Expects? Michael Carruthers, Tax Director, Knowledge Shop Professional firms have been put on notice that Part IVA could potentially apply depending on how profits of the firm are dealt with. We explore what you can and can't do if you want to stay under the radar in light of the ATO's latest guidance in this area.
04:15 pm	05:00 pm	Death, divorce and deterioration Greg Hayes, Director, Hayes Knight With an ageing population and the baby boomer generation moving through the small business system, intergenerational wealth transfer is estimated to be \$2.4 trillion. Greg facilitates this discussion to prepare you to assist clients through these key life events.
06:30 pm		'Red' Gala Dinner. Ready to let your hair down?

Please note the agenda is subject to change. Topics and speakers may change due to unforeseen circumstances



Wednesday, 19 June 2019

		Stream 1	Stream 2
09:00 am	09:45 am	<p>Tax planning for the new company tax rules Jo-anne Hotston, Director, TaxBytes</p> <p>The existing and incoming company tax reductions have created a world of complexity. Jo-anne walks you through the process to ensure that your clients are structured correctly for the future and get the best value from franking credits.</p>	<p>Legal action against SMSF auditors Scott Hay-Bartlem, Partner, Cooper Grace Ward</p> <p>The real and present dangers faced by SMSF auditors from an industry specialist.</p>
09:45 am	10:30 am	<p>Part IVA Boundaries, Cases & Borderlines Cameron Blackwood, Director, Greenwoods & Herbert Smith Freehills</p> <p>Part IVA makes people nervous. How do you know whether arrangements should be seen as 'normal' tax planning or whether something is moving into dangerous territory? Cameron explores the cases and how the dividing lines work in the real world.</p>	<p>Clash of the Titans: Accountants v SMSF Auditors Ray Itaoui, Director, Hayes Knight</p> <p>What accountants should do to make the auditor's life easier and what auditors need to understand about compliance requirements in the real world.</p>
10:30 am	11:15 am	<p>Facilitated by Michael Carruthers, Tax Director, Knowledge Shop.</p>	<p>Moving on from LRBA's Garth McNally, National Education & Training Director, Merit Wealth</p> <p>With the financial institutions cutting back or simply not providing LRBA's, what other options are out there for clients?</p>
11:15 am	11:45 am	Morning tea	
11:45 am	12:45 pm	<p>Why your staff don't care: Building a performance culture Scott Henderson, Director, BSI Learning and psychologist</p> <p>The tools that will help you drive performance inside your firm. What to look for, how to respond effectively to problems, and how to set high performance targets.</p>	
12:45 pm	01:00 pm	Wrap up..time to pack it up and head on out!	

Speaker profiles

In program order

Adam Kendrick
Assistant Commissioner– Agent Engagement and Assurance Individuals and Intermediaries line, Australian Tax Office

Adam has over 28 years' experience in tax administration. He is passionate about creating a better client experience and safeguarding the integrity of the tax system.

Adam is responsible for the ATO's tax agent assurance strategy which aims to increase transparency around the risks and behaviours we see, and how we work with tax agents to address them. He also recently played a leading role in the ATO's Tax Gap program for Individuals not in business and shares his knowledge with other tax jurisdictions as part of his role with the International Monetary Fund.

Andrew Inwood
Principal/Founder, Core Data

Andrew Inwood is the founder and principal of CoreData and has more than 30 years' experience in the Australian financial services industry. He started his career at Rothschild Australia Asset Management where he headed the marketing team, before moving to AMP Investments where he spent more than a decade. During his time at AMP he was seconded to Virgin Direct in the UK to help establish the finance and investment arm of the group.

Andrew returned to Australia to be marketing director of Wizard Home Loans. From Wizard he moved to Telstra where he spent three years as general manager of applications and hosted services, before leaving to start CoreData. He is the author of more than 50 pieces of significant research into clients and their behaviour and has a particular focus on the value of the client experience in financial services.

Belinda Black
Director, New Policy Project Manager
Self-managed Super Fund, ATO



Belinda has over 15 years with the ATO in a broad range of leadership roles. For the last 8 years, she has been responsible for managing complex superannuation projects to implement new legislative superannuation changes. Her challenge has been to ensure engagement with new legislation.

Michael Carruthers
Tax Director, Knowledge Shop

Michael has a knack for seeing through the complexity and helping practitioners work through highly technical issues with certainty and accuracy. He oversees the development of the tax team for Knowledge Shop and Hayes Knight in Sydney and is head of the Hayes Knight group's national tax committee. Michael is a member of the advisory panel for the Board of Taxation and is a member of the reference group for the Board's review of small business concessions. He was also an expert panel member for the Board's review of tax impediments facing small business.

Karen Vella
Director, Green Square Tax

Karen solidified her role as an educator at Webb Martin (Kaplan) before creating her own consultancy. She has worked her magic on leading accounting practices around the country, CPA Australia, the ATO, and now for her audience at this exceptional workshop. Karen understands how to translate complex tax issues into practical, everyday solutions for her audience.

Bringing your spouse/partner to the conference? Your +1 is welcome to attend keynote sessions marked in blue - please register for these sessions.

Speaker profiles

Ray Itaoui Director, Hayes Knight

Ray is a Director of Hayes Knight and a registered SMSF Auditor with extensive experience in the audit, accounting and administration of superannuation funds. Ray has expanded Hayes Knight's Superannuation Division considerably over the last few years. As the head of the SMSF division, he has developed and implemented the processes and procedures to create an efficient, accurate and proactive SMSF compliance, administration and audit service. Ray is that rare breed of person who is not only practical but detail conscious with an in-depth understanding of the impact of the regulatory environment faced by the profession.

Prof. Fang Chen Executive Director Data Science Distinguished Professor, University of Technology Sydney



We don't have enough room in the program to fully explore Prof. Chen's achievements and biography!

Professor Fang Chen is a prominent leader in AI/data science with an international reputation and industrial recognition. She is the winner the 'Oscars' of Australian science, 2018 Australian Museum Eureka Prize for Excellence in Data Science. She is the Executive Director of the University of Technology's Data Sci and a Distinguished Professor, Faculty of Engineering & Information Technology. She was also Senior Principal Researcher with the prominent Data61, CSIRO. Prof. Chen is a prominent figure in creating innovative AI solutions with huge versatility and international impact. Allowing a machine combine a level of domain expertise and computational intelligence, these solutions have helped industries significantly in increasing productivity, safety and customer satisfaction.

Baz Gardner Director, The Social Adviser



Baz and The Social Adviser has gained a second-to-none reputation as teachers of practical business techniques and solutions in the field of digital and social media that are proven to assist business professionals in achieving sustainable success and

business growth in a fun and efficient way. Don't expect to get 'the usual' business rhetoric from Baz, he's an adviser and business owner first and knows there's only three results that matter: more clients, more time, less cost.

[W thesocialadviser.com](http://thesocialadviser.com)
[linkedin.com/in/bazgardner](https://www.linkedin.com/in/bazgardner)

Emmanuel Calligeris Chairman Investment Committee, Easton Wealth

Emmanuel has over 25 years in investment and financial market experience primarily in funds management and investment research. He has in-depth knowledge of investment market operations across all asset classes including equities, fixed interest, property, alternative assets and cash. His previous roles included Chief Investment Officer (CIO) of OptiMix, the multi manager unit of ANZ/OnePath, previously ING Investment Management. He held the CIO role between 1995 and 2013. Emmanuel is also a pragmatist who is in touch with how the decisions and knowledge of advisers has a significant impact on clients.

Speaker profiles

The Hon. Bernie Ripoll "Father of Financial Reform"



Bernie is a former Labor MP for Oxley, who in 2009 chaired the parliamentary inquiry that led to the Future of Financial Advice (FOFA) reforms. A former Shadow Minister for Financial Services and Shadow Minister for Sport, he brings a wealth

of knowledge and an insider's view of the process from policy idea to legislated reform. Dubbed the "Father of Financial Reform," Bernie is a consultant at SAS Group, and director at Map My Plan.

Peter Johnson Founder, SMSF Expert

Peter is a well-known face in the SMSF space. A chartered accountant and CPA Australia Accredited SMSF Specialist, he has been providing SMSF advice to accountants throughout Australia since the introduction of the Superannuation Supervision Act in 1994. Peter provides advice to accountants and other advisers to the SMSF sector on complex matters that may involve limited recourse borrowing arrangements or the transfer of property into or out of a SMSF.

Andrew Gaze Coach, Olympian, basketball legend



Regarded as the greatest basketballer Australia has ever produced, Andrew Gaze has played in a record five Olympic Games and is the highest point scorer in Olympic history. He has also played in four World Championships and is the

second highest point scorer in world championship history. Outside of the Olympics, he led the Melbourne Tigers to victory in the 1993 and 1997 Championships, and he made his NBA debut in 1994 with the Washington Bullets. Later in 1999 after being traded to the San Antonio Spurs, Gaze won the Championship along with his team. Since that time, he has won the NBL scoring title 10 times and has been awarded Most Valuable Player by the same organisation seven times. During his NBL career, Gaze played 612 games, in which he scored a total of 18,908 points, for an average of over 30 points per game. Andrew is also the former coach of the Sydney Kings.

Greg Hayes Director, Hayes Knight

An accountant for over 30 years, Greg has built a successful Australasian accounting group from modest beginnings in the outer suburbs of Sydney. A popular presenter, Greg has 'been there and done that.' There are no untested theories or marketing hype – just practical, realistic principles that are at the core of top quartile firms across Australia. Often described as a "serial entrepreneur" - an apt title for the founder of the Hayes Knight group, Knowledge Shop, Merit Wealth and now Managing Director of ASX listed Easton Investments. He is a practice management specialist, innovator, and published author who mentors and assists other firms to grow and develop their potential.

Jo-anne Hotston Director and lead trainer, TaxBytes

We all know tax can be a little dry. This is why Jo-anne is a sought after corporate trainer and presenter. Her engaging and practical style will bring your in-house or corporate training to life. Since starting TaxBytes in 1995, Jo-anne has built a deeply loyal client base. This is simply because she is a rarity – that unique combination of technical knowledge, pragmatic application, and charisma. Jo-anne is a regular presenter for the major professional associations including CAANZ and the TTI, and is a monthly presenter on CPE.TV. A former director of a mid-tier accounting group, Jo-anne is a Fellow of CAANZ, a Chartered Tax advisor with The Taxation Institute of Australia and holds a Masters in Taxation from the University of Sydney.

Cameron Blackwood
Director, Greenwood & Herbert Smith Freehills



Cameron is a Director at Greenwood & Herbert Smith Freehills and is part of the M&A and corporate team. He specialises in advising clients on the tax complexities of mergers, acquisitions and restructures,

including capital management and cross-border issues, and all aspects of employee share schemes. He holds a Bachelor of Business (Hons) and Bachelor of Laws (Hons) from the University of Technology, Sydney, and a Master of Taxation from the University of Sydney.

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Scott Hay-Bartlem
Partner, Cooper Grace Ward



Scott and his team specialise in assisting clients and their other advisers including accountants and financial planners with tax and superannuation (particularly SMSFs) advice; family businesses, business structuring; business succession arrangements; asset

protection and restructuring. Scott has a particular interest in how these areas intersect with self-managed superannuation funds and the impact of and on these structures.

He is a SMSF Specialist Advisor™ with the SMSF Association, a Chartered Tax Adviser, a member of the Society of Trust and Estate practitioners.

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Garth McNally
National Education & Training Director, Merit Wealth

Garth has a wealth of knowledge and practical experience in superannuation. He is adept in the compliance requirements for practitioners, the technical requirements of the laws and regulations, and the very real impact on clients. Often referred to as the 'super man', Garth is a recognised and in-demand presenter in the field. He is a specialist member of the SMSF Association and a regular writer and speaker on superannuation issues and strategies for the leading professional bodies and the Easton Investments group of companies - Knowledge Shop, Merit Wealth, and GPS Wealth.

Scott Henderson
Director, BSI Learning and psychologist

Scott is entertaining, encouraging, and an expert in leadership, teams and group dynamics, communication and body language, persuasion techniques, stress, and workplace satisfaction. A registered psychologist with a solid background as an educator, Scott spans the spectrum from industrial psychologist to corporate trainer. He is a Master Coach in Behavioural Coaching and coaches both individuals and teams at all levels.

Social Events

All social events are included in the conference program fee.

Your partners are invited at a nominal fee.

Sunday, 16 June 2019

6:30pm

Dinner by the pool

Ease on into the conference program with a casual dinner and entertainment by the pool. Smart casual.

Monday, 17 June 2019

From 5pm

Twilight drinks in the marketplace

The conference doors pull back and the marketplace converted into a funky bar. After a full day, we'll relax with some exceptional entertainment and drinks. Smart casual.

Tuesday, 18 June 2019

From 6:30pm

'Red' Gala dinner

Bring your bling and wear a touch of red. Prepare to dance or just hang out with great food and entertainment. Cocktail attire.

Accommodation

Knowledge Shop has secured preferential rates at The Star.

A booking code is provided to you at registration to access the discounted rates.

Rates include GST, basic wifi and portorage.

The rate is available 3 days prior and 3 days after the conference - so come early and take a break!

Room type	Size (m2)	Room only
Superior Deluxe Room (single, double, twin)	32	\$259
Corner King Room with Balcony	32	\$334
*Executive Deluxe room	32.5	\$409
*Club Suite	81	\$739
	113	\$1148
*King terrace Suite One bedroom	80	\$939
Two bedroom	112	\$1348
*Ocean Terrace Suite One bedroom	110	\$1139
Two bedroom	142	\$1548

Investment

Knowledgexchange represents exceptional value for attendees. Leading edge presenters, technical depth and the current issues explored in an interactive way.

Exceptional per day value from \$368 (\$314 group rate)*

To register

Phone
1800 800 232

Web
[knowledgeshop.com.au/
knowledgexchange](http://knowledgeshop.com.au/knowledgexchange)

Please contact the team at events@knowledgeshop.com.au if we can assist with any information or for group bookings.

Early Bird	General
Payments received before Friday 17 May.	Payments received from 18 May.
\$920 Members	\$990 Members
\$990 Non-members	\$1,100 Non-members

*Early bird member and 5 people group rate booking.