

MKT

TAXATION ADVISORS

2019 Annual PAN Conference



Friday 12th April 2019 At the University Club, Crawley

MKT would like to invite you to the 2019 PAN Conference exclusively for members of the MKT Premium Accountants Network.

We have again assembled a quality group of speakers to discuss a range of topics relevant to your business and those of your clients.



Conference Schedule

Time	Session	Speakers
8:45am – 9:00am	Registration	
9:00am – 9:10am	Conference Welcome	Sean Pearce MKT Taxation Advisors
9:10am – 10:30am	Transactions to Defeat Family Law Claims	Andrew Davies O’Sullivan Davies
10:30am – 11.00am	Morning Tea <i>sponsored by Macquarie Bank</i>	
11.00am – 11.30am	Property as a form of Investment	Peter Agostino Ascot Capital Limited
11.30am – 12.30pm	Business of the Future	Courtney Lauren & Mitch Murphy Macquarie Bank
12:30pm – 12.45pm	Professional Indemnity Insurance	Ashton George EBM Insurance
12:45pm – 1:45pm	Lunch <i>sponsored by EBM Insurance</i>	
1:45pm – 3:15pm	Business Succession: Preparing for after the honeymoon	Russell Morley & Emily Williams IRDI Legal
3:15pm – 3:40pm	Afternoon Tea <i>sponsored by Macquarie Bank</i>	
3:45pm – 5:00pm	Tax Reform under the New Government – MKT Analysis	Sean Pearce MKT Taxation Advisors
5:00pm – 6:00pm	Drinks and Networking at UWA Bar	

Conference Speakers

O'Sullivan Davies
LAWYERS

Andrew Davies

Partner

O'Sullivan Davies

9.10am – 10.30am

Transactions to Defeat Family Law Claims – the Monster Waiting for Estate Planners

This session will provide practical assistance to accountants, financial advisers and commercial lawyers about avoiding this monster in 2 ways:

- First, a presentation about the law on this point and an insight into how to avoid falling foul of section 106B when advising clients on succession and estate planning matters;
 - Second, a case study presented by Sean Pearce, Patrick Cork and Andrew Davies of an actual series of events and transactions in which they are involved on behalf of their client and their entities who were dragged into Family Court financial proceedings between their son and former daughter-in-law. And the details of how the client was ultimately successful.
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Ascot
Capital
LIMITED

Peter Agostino

Director

Ascot Capital Limited

11.00am – 11.30am

Property as a form of Investment

- overview of the different form of investment options available to gain exposure to the property market at all levels
 - how they've performed
 - topical trends/threats currently occurring
 - opportunities they create

Conference Speakers



Courtney Lauren WA Head - Accounting & Financial Services Macquarie Bank	Mitch Murphy Relationship Manager Macquarie Bank	11.30am – 12.30pm
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Business of the future

- Technology is resulting in the pace of change is getting faster every day.
- Customers continue to embrace technology because it saves time, reduces friction and makes life easier.
- In this digital economy, the first movers and very fast followers achieve twice the growth compared with businesses that wait to see what plays out.
- Macquarie's Business of the Future presentation looks at some of the macro factors affecting companies with the intent to help businesses thrive in this changing environment.



Ashton George Regional Director EBM – Insurance and Risk Management	12.30pm – 12.45pm
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Professional Indemnity Insurance

- Current Market Conditions – Professional lines Insurance classes
- Key matters to consider in your firms PI policy
- When do you need to notify your PI insurer/broker of a circumstance
- How to evaluate what Sum Insured or Limit of Indemnity is adequate
- Understanding the schedule of cover you are buying

Conference Speakers



Russell Morley Senior Lawyer IRDI Legal	Emily Williams Lawyer IRDI Legal	1.45pm – 3.15pm
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Business Succession: Preparing for after the Honeymoon

- Setting up the business structure – what is the best structure for the client/business;
- Operation of the business:
 - Day to day management and decision making;
 - Dispute resolution, internal and external processes;
 - Liability, how to protect assets when things go wrong;
- Exit triggers and mechanisms:
 - Voluntary exits: retirement, sale etc; and
 - Involuntary exits: trauma, death, dispute etc.



Sean Pearce Director MKT Taxation Advisors	3.45pm – 5.00pm
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Tax Reform under the New Government – MKT Analysis

The current Government has set the date for the 2019/20 Federal Budget to April 2, in readiness for a May Federal Election. The Federal Labor Opposition will then deliver their Budget Reply Speech on April 4, providing a great opportunity to discuss the Tax Reform policies of both major parties at this year's PAN Conference. Sean and other MKT Tax Specialists will dissect the good, bad and the ugly of both prospective Government's Tax Reform Agenda including:

- The Current Government's Business Enterprise Plan;
 - Labor's proposed changes on Franking Credit Refunds, Negative Gearing, the CGT Discount and more;
 - Other pre-election tax promises made by both parties during their respective Budget Speeches.
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Registration Information

The cost for the 2019 PAN Conference is \$400 (incl GST) per attendee.
PAN PD Vouchers can be used to make full or part payment for attendees:

1 Attendee - \$400 (2 PD vouchers / 1 PD voucher + \$200)

2 Attendees - \$600 (3 PD Vouchers / 2 PD vouchers + \$200)

3 Attendees - \$800 (3 PD Vouchers + \$200 / 2 PD Vouchers + \$400)

(Current and upcoming membership PD vouchers available to use)

To register, please complete the details below and send this page to
Nicola.devonald@mkttax.com.au or call 08 9481 8448 by **Friday 29th March 2019**.

Attendee Names

Email Address

1. _____

2. _____

3. _____

Company: _____

Credit Card Payments: Visa | Mastercard AMEX

PAN Vouchers # ___ # ___ # ___ # ___

Card No.: ____/____/____/____

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Conference Sponsors



Conference Lunch Sponsor – EBM Insurance

Ashton George – Regional Director WA

T: 0413 758 650

E: AshtonG@ebm.com.au



Conference Morning and Afternoon Tea Sponsor - Macquarie Bank

Courtney Lauren – WA Head - Accounting & Financial Services

T: 08 9224 0732

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