



IPA INSTITUTE OF PUBLIC  
ACCOUNTANTS

## NSW/ACT CPE

# FIT FOR THE FUTURE CONFERENCE

[publicaccountants.org.au/events-and-training](http://publicaccountants.org.au/events-and-training)

### About the Presenters

#### CHRISTOPHER CATTO, DIRECTOR, PUTNEY BREEZE BUSINESS ADVISORS

Chris Catto's career has involved various senior financial and management roles for world class industry leading organisations. Across his career Chris has successfully managed and improved executive management reporting, product development, cash flow, team performance, budgeting, and forecasting. His experience also includes conducting due diligence on acquisition targets for a publically listed multinational organisation, concluding with price recommendations.

Chris has been employed by global industry leaders such as Aviva, the BBC and leading Australian companies Toll and Southcorp. Apart from being a qualified accountant, Chris holds a Bachelor of Commerce, a Master of Business Administration and a Certificate IV in Training and Assessment and is the author of Premiership Business.

#### PETER ADAMS, DIRECTOR, LEGIScript SERVICES

Peter has more than 20 years experience as a tax professional. He has worked in senior tax roles in both the profession and commerce having started his career with KPMG and PWC before moving on to become Head of Tax for BNP-Paribas (Australia and New Zealand) and subsequently Chase Manhattan-Ord Minnett. More recently Peter has been a Senior Tax Partner with Bell Partners and Kelly + Partners.

Peter's career has also focused on delivering taxation education and training to professional Accountants throughout Australia; he was a Senior Tax Trainer with the Institute of Chartered Accountants; Taxation presenter and lecturer for WebbMartin, Kaplan and various Universities; and was a Senior Tax Writer with CC H Australia. Peter is renowned for his engaging presentation skills and outstanding technical knowledge of the Australian Taxation landscape.

### DATE

Thursday 19 & Friday 20 March 2015

### TIME

9.00am to 5.00pm  
(registration from 8.45am)

### VENUE

Sydney Harbour Marriott Hotel  
Circular Quay  
30 Pitt Street, Sydney

### FEE FROM

*Get in Quick Price \$549 Book  
and Pay By 30 January 2015*  
Early Bird Member \$699  
Early Bird Non-Member \$749  
(incl. GST)

### CPE

Claim up to 16 CPE hours

### INCLUDES

Tuition, notes, catering

***Book before 30 January and save!***



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#### **ASHLEY COURSE FIPA, DIRECTOR, ARC SUPER**

Ashley specialises in the provision of SMSF audit, technical and training services. Ashley has extensive experience designing and developing audit and quality control systems, plans and programs. For the last 7 years Ashley has trained and developed audit content for the professional accounting bodies and audit software providers. Ashley's most recent experience includes being part of ASIC's SMSF Auditor Competency Exam Committee and Treasury's Stronger Super working group. Ashley's experience also extends to training the CPA Australia Quality Reviewers on Auditing and Professional Standards and lecturing in Audit and Risk Management at Bond University on the Gold Coast.

#### **DR. PRABHU SIVABALAN, ASSOCIATE PROFESSOR, UNIVERSITY OF TECHNOLOGY SYDNEY**

Dr. Prabhu Sivabalan is Associate Professor in management accounting at the University of Technology, Sydney. He has a PhD in budgeting, strategy and management control systems. He frequently conducts industry presentations to professional members and organisational groups throughout Australia, and continues to research and advise companies on best practice management accounting systems for organisations.

From a teaching perspective, Prabhu lectures in the MBA and undergraduate course subjects offered by the UTS School of Accounting.

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# NSW/ACT FIT FOR THE FUTURE CONFERENCE

DAY ONE THURSDAY 19 MARCH 2015

8 CPE HOURS

8.30am - 8.50am	Registration	
8.50am - 9.00am	Welcoming address	
9.00am - 10.30am	<b>Building a Value Add Finance Partnering Function</b> <i>Chris Catto, Director, Putney Breeze Business Advisors</i> <p>The future of Accounting is about partnering and advising across the whole entity to add value and build capability and capital. This opening session is designed to demonstrate to all Accountants in business, public sector and practice the increasing vital role they play in defining critical success factors, identifying and shaping goals, accountabilities and KPIs.</p>	
10.30 - 11.00am	Morning tea and networking	
11.00am - 12.30pm	<b>Management Reporting that Enables Innovation &amp; Entrepreneurship</b> <i>Chris Catto, Director, Putney Breeze Business Advisors</i> <p>The session focuses on how the Finance professional can position themselves to lead an entrepreneurial business culture. Developing management reports that enable innovation and entrepreneurship will deliver great value to your employers, business and clients that increase revenue opportunities and build your professional brand.</p>	<b>SMSF Auditor Independence &amp; Reporting/Communication Requirements</b> <i>Ashley Course, Director, Arc Super</i> <p>This session outlines the independence and ethical requirements SMSF auditors must adhere to and more importantly this session outlines the requirements that extend beyond forming an opinion on the financial report and SIS provisions which enables SMSF.</p>
12.30pm - 1.30pm	Lunch and networking	
1.30pm - 3.00pm	<b>Aligning KPIs with Strategy</b> <i>Chris Catto, Director, Putney Breeze Business Advisors</i> <p>Transform your finance function by discovering the techniques and processes required to successfully align KPI's with strategy, including managing business buy-in, understanding the importance of data ownership and building practical workflow and timelines for the delivery of effective meaningful reports.</p>	<b>Related Unit Trust &amp; Other In-House Assets</b> <i>Ashley Course, Director, Arc Super</i> <p>Keep up to date with the SISA and SISR requirements relating to in-house SMSF assets including investments in related trusts and related companies, loans to related parties, and the mandatory auditing and assurance requirements.</p>
3.00pm - 3.30pm	Afternoon tea and networking	
3.30pm - 5.00pm	<b>Transforming Management Reporting</b> <i>Chris Catto, Director, Putney Breeze Business Advisors</i> <p>This session provides a real case study about redesigning management reports from instigation to implementation.</p>	<b>Valuation Issues Associated with Complex SMSF Assets</b> <i>Ashley Course, Director, Arc Super</i> <p>SMSF assets are becoming increasingly complex which in turn builds complexity and risk around valuating them. This session outlines the importance of obtaining sufficient appropriate audit evidence to support the opinion on whether the SMSF assets have been valued at market value.</p>

# NSW/ACT FIT FOR THE FUTURE CONFERENCE

DAY TWO FRIDAY 20 MARCH 2015

8 CPE HOURS

8.30am - 8.55am	Registration	
8.55am - 9.00am	Welcoming address	
9.00am - 10.30am	<p><b>Key Taxation Issues Affecting Small Business</b>  <i>Peter Adams, Director, Legscript Services</i>            Peter will outline the latest rulings, legislation and cases affecting small business</p>	<p><b>Sustainability Accounting</b>  <i>Dr. Prabhu Sivabalan, Associate Professor, University Of Technology</i>            Companies and organisations are not now solely judged on financial performance. Working out where to start and how to account for and measure environmental, social and governance (ESG) performance can be difficult for the public sector, small business and your clients business. Dr Sivabalan will outline the steps to accounting for and measuring ESG performance.</p>
10.30 - 11.00am	Morning tea and networking	
11.00am - 12.30pm	<p><b>The New Part IVA: the Risks for Small Business</b>  <i>Peter Adams, Director, Legscript Services</i>            Business owners make many decisions and some of these can have taxation implications that they may or may not be aware of. This session reviews recent cases and ATO guidelines impacting the application of Part IVA on business transactions. .</p>	<p><b>Environmental Reporting Frameworks</b>  <i>Dr. Prabhu Sivabalan, Associate Professor, University Of Technology</i>            Following from the previous session this part of the presentation outlines the reporting frameworks you can adopt and implement to build stakeholder confidence and brand awareness.</p>
12.30pm - 1.30pm	Lunch and networking	
1.30pm - 3.00pm	<p><b>Tax Effective Pay Structures to Attract and Motivate Employees</b>  <i>Peter Adams, Director, Legscript Services</i>            To ensure the future growth of an organisation, owners need to attract and maintain the commitment of their employees. This session outlines the latest in salary packaging, tax treatment of incentives and ATO recent cases.</p>	<p><b>Implementing Sustainability Reporting</b>  <i>Dr. Prabhu Sivabalan, Associate Professor, University Of Technology</i>            This interactive session asks you to consider the issues around implementing and maintaining sustainability reporting.</p>
3.00pm - 3.30pm	Afternoon tea and networking	
3.30pm - 4.15pm	<p><b>Transforming Management Reporting - Integrating Non-Financial Reporting</b>  <i>Dr. Prabhu Sivabalan, Associate Professor, University Of Technology</i>            Dr. Prabhu Sivabalan's final presentation identifies key non-financial measures, and explains how they may be harmoniously integrated into existing traditional performance management systems in organisations.</p>	
4.15pm - 5.00pm	Transform your workplace in to a fitplace	





## REGISTRATION FORM AND TAX INVOICE

ABN 81 004 130 643

### IPA NSW/ACT FIT FOR THE FUTURE CONFERENCE

Date: Thursday 19 & Friday 20 March 2015

Time: 9.00am to 5.00pm (Both Days)

Location: Sydney Harbour Marriott Hotel, Circular Quay, 30 Pitt Street, Sydney

Register online or complete this registration form and return to:

Institute of Public Accountants, Locked Bag A6090, Sydney South, NSW 1235

t (02) 8262 6000 f (02) 9283 8277 e [nswdivn@publicaccountants.org.au](mailto:nswdivn@publicaccountants.org.au)

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

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

Second Attendee: \_\_\_\_\_

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

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

Dietary Requirements \_\_\_\_\_

### AMOUNT PAYABLE

*This document will be a Tax Invoice for GST purposes when you make full payment. Please keep a copy for your records.*

Registration Type	Get in Quick Price Register & Pay by c.o.b. 30 January	Early Bird Price (Register & Pay by c.o.b. 19 February)	Regular Price (Register & Pay between 20 February and 12 March)
<input type="radio"/> Full 2 Day Registration	<input type="radio"/> \$549 Members	<input type="radio"/> \$699 Member <input type="radio"/> \$749 Non Member	<input type="radio"/> \$799 Member <input type="radio"/> \$849 Non Member
<input type="radio"/> Single Day Registration	N/A	<input type="radio"/> \$375 Member <input type="radio"/> \$425 Non Member	<input type="radio"/> \$425 Member <input type="radio"/> \$475 Non Member
<input type="radio"/> Day 1 <input type="radio"/> Day 2			

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

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

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

### AN EMAIL CONFIRMATION WILL BE SENT TO YOU SHORTLY.

**Registration Confirmation** - A confirmation email will be sent to you within 48 hours of the IPA receiving your registration. Please notify the IPA by phone or email if you do not receive a confirmation email within this timeframe.

**Get in Quick Price \$549** - Register and pay by COB Friday 30 January 2015

**Early Bird Prices** - Register and pay by COB Thursday 19 February 2015

**Privacy Statement** - The Institute of Public Accountants (IPA) acknowledges the importance of privacy and of safeguarding personal information. Any personal details provided to IPA will be protected in line with National Privacy Policy principles and the laws and regulations regarding such matters, as are applicable in Australia.

**Cancellation Policy** - Cancellations received in writing prior to 6 March 2015 will be accepted and all fees refunded less AUD\$100 administrative fee. No refund will be given after 6 March 2015 (application for refund will only be considered under exceptional circumstances). Cancellation must be advised in writing. Delegates who cancel may nominate a substitute without penalty, or failing that will be entitled to receive the course notes and other materials placed in Congress satchels.