

Are you 'NTAA-ready'?

**BOOK
NOW**

Are you a recent graduate or professional looking to **master** the **challenges** of preparing the **ATO's business income tax returns**?

We have gone 'back to basics' and identified the **practical knowledge** and **skills** tax practitioners **need** to confidently **complete Company, Trust and Partnership tax returns**.

**10
Hours
of CPD**

What is the 'Tax Accelerator Series: Business Returns'?

The next instalment of the NTAA **Tax Accelerator Series** focuses on preparing 2024 tax returns for business entities.

This seminar will enhance **confidence** when dealing with income tax returns for your **company, trust and partnership clients**.

You will build '**client focused**' **skills** to identify key technical issues and understand their practical application using specific examples and dedicated case studies.

Apply these concepts in **real-world situations** and establish yourself as a **valued member of your firm** and a **trusted adviser to entity clients**.

Live streamed access to dedicated Q&A segments will allow for real-time answers.

How will the Tax Accelerator Series be presented?

- ◆ Four **2.5 hours** live streamed modules will be presented across **four separate days over four weeks** giving a total of **10 hours CPD**.
- ◆ **All modules** will be recorded **for future reference** or to catch-up on missed live streams.
- ◆ Each module comes with **comprehensive NTAA materials** that attendees can rely upon in their daily practice and form the cornerstone of their tax technical library.
- ◆ After each module, an optional quiz will **reinforce** your **learning** and **understanding**.



Additional benefits for Attendees

- ◆ **NTAA Tax Accelerator Series Toolkit**
Receive access to our 2024 Toolkit to assist with getting your business entity returns RIGHT:
 - Client Engagement Letter Packages
 - NTAA Division 7A agreement templates
 - 2024 Business Tax Returns checklist
 - FREE Professionals Risk Assessment Software
- ◆ **NTAA Hotline Call**
Still need a little help? Call our Tax Hotline with a complimentary 10 minute call.

Who will benefit from these sessions?

- ◆ Graduates;
- ◆ New employees;
- ◆ Accountants new to public practice;
- ◆ Accountants returning to the workforce; and
- ◆ Practitioners wanting to 'brush up' on **Company, Trust and Partnership Returns**.

**10
Hours
of CPD**



**Live Streamed
and Online**



**Live
Q&A**



**Detailed
Seminar
Materials**



**2024
Tax
Toolkit**



**Free
Hotline
Call**

MODULE 1

Business Returns: An introduction to the key considerations

- Confidently manage client engagements
- Become familiar with the requirements of **Company, Trust** and **Partnership** return obligations and ensure you can efficiently obtain information from clients
- Identify what you need to know to navigate the current tax practitioner landscape
- Appreciate the pros and cons of **Company, Trust** and **Partnership** business structures
- Navigate the key differences between a **Company, Trust** or **Partnership** business return
- Understand the process for preparing a business return
- Appreciate the tax concessions associated with being a Small Business Entity ('SBE')
- Test your skills - Optional quiz

Date: Thursday 31 October
Time: 10.00am - 12.30pm



MODULE 2

Business Returns: Business income and deductions

- Identify the impact of GST on business income and deductions
- Confidently advise when a business client must register for GST
- Understand the key tax issues relating to business income and the business returns
- Master maximising business deductions for your clients
- Be up-to-date with the new or unique deductions available to **Company, Trust** and **Partnership** clients for the 2024 tax season
- Efficiently identify differences between accounting and tax concepts to complete tax reconciliations
- Test your skills - Optional quiz

Date: Friday 8 November
Time: 10.00am - 12.30pm



MODULE 3

Business Returns: Entity Specific Issues

- Understand the specific issues impacting the preparation of a **2024 Company Tax Return**
- Confidently determine the applicable company tax rate and franking rate for different corporate structures
- Obtain clarity on what is required when a company client wants to pay franked distributions
- Gain an appreciation of what is required to navigate the company loss rules when there is a change in the majority underlying interests of a company
- Understand the key issues impacting the preparation of the **2024 Trust Tax Return**
- Identify who is taxed when a trust structure is utilised
- Consider specific tax issues that arise for the **2024 Partnership Tax Return**
- Test your skills - Optional quiz

Date: Thursday 14 November
Time: 10.00am - 12.30pm



MODULE 4

Business Returns: Specialist Business Topics

- Master the fundamentals of Division 7A - loans, payments and debt forgiveness
- Confidently calculate a client's minimum yearly repayments for their Division 7A loans
- Manage unpaid present entitlement to corporate beneficiaries (i.e., 'bucket companies')
- Explore the key timing requirements to protect clients from unwanted deemed dividends
- Confidently advise clients on the correct tax treatment of personal exertion income and the latest on income splitting
- Advise clients when the PSI regime applies to them and what it means for their ultimate tax liability
- Understand the impact of the ATO's views relating to the allocation of profit by professional firms
- Test your skills - Optional quiz

Date: Wednesday 20 November
Time: 10.00am - 12.30pm





Tax Accelerator Series: Business Returns

Members

One delegate

- ◆ \$469 PDF notes and software (incl. GST)
- ◆ \$499 Hardcopy notes and software (incl. GST)

Additional Delegate

- ◆ \$329 PDF notes and software (incl. GST)
- ◆ \$359 Hardcopy notes and software (incl. GST)

Non-Members

One delegate*

- ◆ \$569 PDF notes and software (incl. GST)
- ◆ \$599 Hardcopy notes and software (incl. GST)

Additional Delegate*

- ◆ \$469 PDF notes and software (incl. GST)
- ◆ \$499 Hardcopy notes and software (incl. GST)

(Note*): Registration includes 3 months full membership)

Group discount

If more than one delegate from the same practice attends under the one registration, a discount will apply to the second and subsequent delegates. The first delegate pays the full registration fee.

Attendees can access the recorded sessions for future reference or catch-up on missed live streamed dates.

Live Streamed Dates and Times

- | | |
|---|--|
| <input type="checkbox"/> MODULE 1: Thursday 31 October 10.00am to 12:30pm AEDT | <input type="checkbox"/> MODULE 2: Friday 8 November 10.00am to 12:30pm AEDT |
| <input type="checkbox"/> MODULE 3: Thursday 14 November 10.00am to 12:30pm AEDT | <input type="checkbox"/> MODULE 4: Wednesday 20 November 10.00am to 12:30pm AEDT |



Online Registration Form

Please retain this original document as your tax invoice. This document will be a tax invoice for GST when fully completed and you make payment to the National Tax & Accountants' Association Ltd. NTAA's ABN: 76 057 551 854

NTAA Membership No. _____

Name _____

Email _____

Firm _____

Address _____

State _____ Postcode _____

Telephone No. () _____

PDF notes Hardcopy notes

Delegate 1 _____

Email Address _____

Delegate 2 _____

Email Address _____

Charge for online seminar _____

Total (incl. GST) \$ _____

Mastercard Visa Amex

Card No. _____

Expiry Date _____

Name on Card _____

Signature _____

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Not an NTAA Member?

For only \$385 per annum per firm, you receive:

- ◆ 11 editions of our monthly magazine, *Voice*
- ◆ THREE 10 minute Tax Hotline calls per year
- ◆ access to our Tax Hotline written confirmation service
- ◆ discounts on our practical tax-based seminars – both face to face and online
- ◆ access to all your online seminars and seminar notes in your personal NTAA library in the Members Area of our website
- ◆ practice support documents
- ◆ a year-end supplement, providing a quick reference to useful key rates and thresholds
- ◆ access to exclusive products
 - Professional Indemnity Insurance
 - Tax Audit Insurance
 - Cyber Insurance
 - Our AFSLs, Advice Assist Australia and SMSF Advisers Network

NTAA's Gold Membership

NTAA's Gold Membership is designed to support you and your team with more CPD and more technical support.

For \$1,320 (incl GST) per annum, per firm, Gold Members receive:

- ◆ 12 hotline questions with written confirmations.
- ◆ Access to our current Hot Spots seminar series, which include practical notes.
- ◆ Access to new Hot Spots seminars as they are released throughout the year.

PLUS... Gold Members also receive all other member benefits mentioned above.

Your Seminar Presenters

Rebecca Morgan

A Taxation Specialist with over 24 years of experience in Australian tax law, Rebecca currently writes and presents for and on behalf of the NTAA on a broad range of taxation areas.

Before joining the NTAA, Rebecca worked at the ATO managing an 'Aggressive Tax Planning' audit team.

Rebecca has completed a Bachelor of Arts and Laws and a Masters of Taxation. She is also a Fellow of the NTAA and a registered tax agent.



Fatma Hashim

Fatma is a Taxation Specialist with over 30 years experience in accounting/tax, spanning commerce, public practice and the tax profession.

Her current role at the NTAA allows her to indulge her passion for assisting tax practitioners in understanding taxation laws.

Fatma has completed a Bachelor of Commerce. She is a qualified Chartered Accountant and also a Fellow of the NTAA.



Cancellation Policy for Online and Live Streamed Seminar

If the registrant has not accessed the seminar or materials, a full refund/credit will be available.

There will be no refund/credit available 90 days after purchase.

The NTAA reserves the right to cancel or reschedule courses, change speakers or revise content as necessary.