Tax Accelerator Series: Individual Returns

NTAA ONLINE

BOOK NOW

Are you 'NTAA-ready'?

Are you a recent graduate or professional looking to **master** the **challenges** of preparing the **ATO's Individual income tax return** (the 'I' Return)?

We have gone 'back to basics' and identified the **practical knowledge** and **skills** tax practitioners **need** to confidently **complete the 'I' Return**.

10 Hours of CPD

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

The first instalment of our **Tax Accelerator Series** focuses on preparing the 'I' Return.

This will enhance **confidence** with **employee**, **sole trader** and **investor 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 clients**.

With guidance from our expert NTAA presenters you will receive **10 hours** of **CPD** over a four week period for managable, in-depth learning.

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 hour** live streamed modules will be presented **over four** separate **days over four weeks**.
- **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 with everything you need to get the return RIGHT:
  - Client Engagement Letter Packages
  - Individual Tax Return Kit
  - Practice Precedent Documents
  - **NTAA DEDUCTION FINDER** 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 the 'I' Return.

10 Hours of CPD

Live Streamed and Online	Live Q&A	Detailed Seminar Materials	2024 Tax Toolkit	Free Hotline Call

National Tax & Accountants' Association Ltd.
249-251 Park Street, South Melbourne, Vic. 3205
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MODULE 1

Introduction to the 2024 'I' Return

- Confidently manage client engagements and client interviews
- Understand the self-assessment system in which you work
- Audit proof your clients – obtain clarity on record-keeping requirements
- Appreciate the interaction of assessable income and deductions
- Identify other issues affecting an individual's tax liability, including the Medicare levy and surcharge, private health insurance and income tax offsets
- Understand how 'minors' (i.e., children) are taxed
- Test your skills – Complete the quiz

Date: Thursday 29 August
Time: 10.00am – 12.30pm

29 AUG

MODULE 2

Completing the 2024 'I' Return for Employee Clients

- Identity the key employment-related income items
- Confidently deal with Employment Termination payments
- Understand the Employee Share Schemes rules
- Master the deduction labels – Items D1 to D5
- Ensure clients working from home know how to substantiate and maximise their deductions
- Apply your new or refreshed skills in the employee client case study: Pia the employee architect
- Test your skills – Complete the quiz

Date: Thursday 5 September
Time: 10.00am – 12.30pm

05 SEPT

MODULE 3

Completing the 2024 'I' Return for Investor Clients

- Focus on the key income and deduction labels for investor clients
- Appreciate what is required when dealing with super income streams and lump sum payments
- Confidently advise on the tax treatment of children's bank accounts
- Understand the NEW trust distribution reporting requirements from the 2024 income year
- Determine if you are dealing with a share trader versus a share investor
- Master CGT calculations for investors
- Navigate the return requirements for rental properties
- Apply your new or refreshed skills in the investor client case study: Toby the investor
- Test your skills – Complete the quiz

Date: Wednesday 11 September
Time: 10.00am – 12.30pm

11 SEPT

MODULE 4

Completing the 2024 'I' Return for Sole Trader Clients

- Master the Business and Professional Items Schedule
- When is an individual taxpayer carrying on a business?
- Understand the benefits of the small business entity regime
- What deductions are denied if income is classified as Personal Services Income ('PSI')
- Navigate the specific reporting rules required for sole traders deriving PSI
- Demystify Item P8 – the 'I' Return's tax reconciliation process
- Apply your new or refreshed skills in the sole trader client case study: Colin and CM Airconditioning Services
- Test your skills – Complete the quiz

Date: Wednesday 18 September
Time: 10.00am – 12.30pm

18 SEPT

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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

- ❐ **SESSION 1:** Thursday 29 August
  10.00am to 12:30pm AEST
- ❐ **SESSION 2:** Thursday 5 September
  10.00am to 12:30pm AEST
- ❐ **SESSION 3:** Wednesday 11 September
  10.00am to 12:30pm AEST
- ❐ **SESSION 4:** Wednesday 18 September
  10.00am to 12:30pm AEST

10 Hours of CPD

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 ____________________

NTAA's Privacy Policy and Collection Notice sets out how we collect and deal with your personal information. You can access those documents at ntaa.com.au/privacy. Our cancellation policy for our Online Seminars can be found at ntaa.com.au/store-policy.

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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

Introducing NTAA's Gold Membership

We are excited to announce NTAA's Gold Membership which 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 - click here for a list of Hot Spots seminars.
- 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.

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