

May Educational Event

19 May, 2011 The Sebel, Newcastle Beach – Morrow Room

These practical sessions will allow you to drive strategic & operational initiatives related to forecasting and tax planning - saving your organisation time and money via efficiency gains, enhanced reporting & tax effective structuring.

Session 1 Implementing the Rolling Quarterly Forecast [RQF]

9.00am -12.30pm

Presented by John Petty: International expert, author and business coach

Session 1 overview:

The saying 'The annual budget is dead, long live the Rolling Forecast' is SO TRUE!

John Petty will discuss the concept of the RQF which is now used by over 60% of corporate businesses in Australia.

What is this RQF? Does it replace budgeting? How far out do you forecast and how do you roll over periods?

What is the impact on business performance reporting and what do you report against ?

Jeremy Hope of the Beyond Budgeting Round Table described Rolling Forecasts as the PANACEA to our current woes with management and board reporting.

John's workshop will show you how to implement the RQF and take your business to another level of performance.

Networking Lunch

12.30pm – 1.30pm

A gourmet hot buffet lunch served with freshly brewed coffee and a selection of teas and juice will be served to our conference room to give members the greatest opportunity to meet and network with each other.

Please notify jbirchall@lawlerpartners.com.au of any dietary requirements.

Session 2 Corporate Structuring in a Tax Effective Way

1.30 – 2.30 pm

Presented by Simon Rutherford & Darren Shone, Business Services & Taxation Partners, Lawler Partners

Session 2 overview:

There have been some recent tax law changes that have the potential to significantly impact on the effectiveness of business operations, structures and strategies. This session will provide:

- Broad overview of structuring principles including business sales & acquisitions
- Changes concerning the use of trusts as part of business operations & potential implications
- Revisions to the R&D laws and the criteria for eligibility
- ATO decisions that will impact on transfer pricing practices
- Changes to employee share schemes and effective structuring.

The focus of the session will be on the practical outcomes and considerations, with the use of case studies.