



Agenda

Title:	Large Business Stewardship Group		
Issue date:	21 March 2019		
Venue:	Australian Taxation Office, McKay Boardroom, Level 10 Amungula, 26 Narellan Street, Canberra, ACT		
Event date:	29 March 2019	Start: 10.00	Finish: 15.00

Chair:	Tim Dyce	Facilitator:	Christina Jong
Contact	(02) 9374 2984 0411 126 703	Contact phone:	(03) 8601 9389 0432 341 252

Attendees: Australian Taxation Office

- names/section**
- Tim Dyce, Deputy Commissioner, Private Wealth (LBSG Co-Chair)
 - Rebecca Saint, Deputy Commissioner, Public Groups (LBSG Co-Chair)
 - Megan Yong, Assistant Commissioner, Client Engagement Group
 - Christina Jong, LBSG Secretariat, Public Groups

Guest Attendees

- Belinda Darling, Assistant Commissioner, Public Groups
- Judy Morris, Assistant Commissioner, Public Groups
- Michael Morton, Assistant Commissioner, Public Groups
- George Montanez, Assistant Commissioner, Public Groups
- Sharon Murray, Assistant Commissioner, Public Groups
- Nadine McBain, Assistant Commissioner, Data Management
- Craig Powell, Director, Indirect Tax

Treasury/ Board of Taxation

- Karen Payne, Chief Executive Officer, Board of Taxation
- Paul McCullough, Division Head, Corporate and International Tax Division, The Treasury

Business Community Representatives

- Michelle de Niese, Executive Director, Corporate Tax Association (LBSG Co-Chair)
- Steve Southon, Chief Tax Officer, Group Tax, National Bank of Australia
- Premila Roe, Vice President Tax Asia Pacific, BHP Billiton
- Kimberley Simpson, Group Tax Manager, Cochlear Limited
- Cristina Wolters, General Manager Taxation, Transurban
- Marc Lewis, Global Head of Tax, Woodside Energy Ltd (representing the 'Group of 100')
- Mimi Ferguson, Group Taxation Manager, Adelaide Brighton Cement
- Bevan Grace, Group Tax Manager, Australian Super
- Josie Guastalegname, Group Head of Tax, SEEK Limited
- Ben Guthleben, Director Taxation, Telstra
- Michael Fenner, Taxation Manager, Chevron Australia (representing APPEA)
- Grant Wardell-Johnson, Partner, KPMG (representing the 'Big 4')
- Dudley Heywood, Chair, Income & International Tax Working Group, Property Council of Australia
- Pero Stojanovski, Senior Economist, Business Council of Australia
- Vivian Chang, Law Council of Australia

**Apologies:
name/section**

Jeremy Hirschhorn, Second Commissioner, Client Engagement Group
 Maryanne Mrakovcic, Deputy Secretary, Revenue Group, The Treasury

Item	Time	Topic	Presented by
SESSION 1			
1.	10.00 to 10.10	Welcome and introductions	Tim Dyce (Meeting Chair)
2.	10.10 to 10.30	Recent developments in large business tax policy <i>Discussion on recent developments in large business tax policy</i>	Paul McCullough
3.	10.30 to 10.40	Client Engagement Group (CEG) realignment <i>Discussion on the recent CEG realignment</i>	Rebecca Saint

Item	Time	Topic	Presented by
4.	10.40 to 10.55	CTA relationship survey <i>Discussion on findings from the CTA survey</i>	Michelle de Niese
	10.55 to 11.15	Morning tea	
SESSION 2			
5.	11.15 to 12.00	Compliance risks and emerging issues <i>Discussion on emerging compliance risks or concerns, including:</i> <ul style="list-style-type: none"> • <i>Feedback on ATO tax data release 2018</i> • <i>Legal professional privilege (LPP)</i> • <i>Update on the Senator Patrick Order</i> 	Rebecca Saint/ Tim Dyce/ Michael Morton/ Craig Powell
6.	12.00 to 12.20	Reportable tax position (RTP) schedule <i>Discussion on the RTP schedule including:</i> <ul style="list-style-type: none"> • <i>ATO's expectations around RTP disclosures</i> • <i>Insights on risk ratings on RTP disclosures as part of the Top 100/ Top 1000 review program</i> 	Michael Morton
7.	12.20 to 12.40	Justified trust and corporate governance <i>Discussion on the Top 100 and Top 1000 programs and extension to GST reviews including:</i> <ul style="list-style-type: none"> • <i>Update on the progress for Top 100/ Top 1000/ GST reviews</i> • <i>Insights from the joint CTA/ ATO/ Wolters Kluwer Justified Trust workshops</i> 	Belinda Darling/ Judy Morris/ George Montanez

Item	Time	Topic	Presented by
8.	12.40 to 13.00	Board of Taxation <i>Discussion on recent developments at the Board of Taxation including:</i> <ul style="list-style-type: none"> • <i>Update on post-implementation review of the Tax Transparency Code</i> 	Karen Payne
	13.00 to 13.30	Lunch	
SESSION 3			
9.	13.30 to 13.50	Private ruling program <i>Discussion on the status of the rulings program including:</i> <ul style="list-style-type: none"> • <i>Use of priority ruling processes</i> • <i>Use of 'comfort letters'</i> 	Sharon Murray
10.	13.50 to 14.10	ATO data strategy <i>Discussion on ATO's data management and utilisation strategy</i>	Nadine McBain
11.	14.10 to 14.30	Industry perspective <i>Discussion on emerging trends and issues in the oil and gas industry</i>	Michael Fenner
12.	14.30 to 14.50	Effectiveness and contribution of the LBSG <i>Members are invited to provide feedback on the effectiveness of the LBSG and suggestions for improvements</i>	Tim Dyce
13.	14.50 to 15.00	Other business	Tim Dyce
	15.00	Meeting close	