

# Shaping the Future

Join us for our 2024 professional development day for finance professionals within the Education and Not-for-profit industry.

Our theme this year is 'shaping the future' where we will delve into key aspects to consider when shaping the future of your organisation.

Jarrold Walsh will be delivering a session to shape your conversations going forward so you can excel at connecting and communicating with others.

The day would not be complete without our technical updates on audit, GST and FBT along with an economic update from Nick Costello, JBWere.



## **Keynote Speaker - Jarrod Walsh, SpeakGood**

Jarrold Walsh is a communications expert, as the voice of Live Sport in Australia, two decades working on national radio and engaged by brands around the country to communicate their message to key stakeholders, through SpeakGood – he shares his philosophy on communication and connection with you.

### **Date**

Wednesday, 20 November 2024

### **Time**

Light breakfast and registration: 8:00am to 9:00am

Sessions: 9:00am to 3:40pm followed by networking drinks

### **Venue**

Crowne Plaza, 27 Frome Street, Adelaide SA

### **Cost**

Complimentary to attend for Nexia Edwards Marshall clients, but places are limited. For those who are not clients, please email [marketing@nexiaem.com.au](mailto:marketing@nexiaem.com.au) for pricing.

### **Register**

Click [here](#) to register for the event by 6 November 2024

# Program

## Professional development day for Education and Not-for-profit finance professionals

- 8:00am** ● **Registrations open and a light breakfast**
- 9:00am** ● **Welcome**  
Damien Pozza, Nexia Edwards Marshall
- 9:15am** ● **Key governance issues in the Not-for-profit space | Fiona Stapleton**  
This session summarises some key governance issues that are often overlooked in the not-for-profit space, including compliance with legal and regulatory frameworks, ACNC governance standards and undertaking commercial activities.
- 10:00am** ● **Keynote: Communication workshop | Jarrod Walsh**  
SpeakGood is not just changing the way people connect and communicate, it is changing lives for the better. Through this engaging, entertaining and inclusive presentation, Jarrod covers Public Speaking, Leadership, Crisis and Stressful Communication, Nerves & Anxiety, Personal Brand, Preparation and more.  
  
You will leave feeling inspired, motivated and passionate about ensuring your connections on a personal and professional level are authentic, real and matter.
- 11:00am** ● **Morning tea**
- 11:30am** ● **Economic update | Nick Costello**  
This session will provide you with an economic and market update, and how this may impact your organisation.
- 12:15pm** ● **Audit hot topics | Chetan Trivedy and Cassandra Daniells**  
This session will assist you in understanding the most common audit issues in preparation for your upcoming audits.
- 1:00pm** ● **Lunch**
- Education stream**

**2:00pm** ● **FBT update | Raoul Stevenson & Tahlia Lee**  
An update session to assist you to navigate the risks and embrace the opportunities.

**2:45pm** ● **GST workshop | Caitlin Chase & Lauren Rooney**  
An interactive workshop covering the various GST issues that are common to schools, such as engaging a supplier without an ABN, rent of hall or oval, GST free supplies, bus services, grants received, fundraising and non-profit sub-entities.
- Not-for-profit stream**

**GST workshop | Caitlin Chase & Lauren Rooney**  
An interactive workshop covering the various GST issues and different GST concessions available to not-for-profits.

**FBT update | Raoul Stevenson & Tahlia Lee**  
An update session to assist you to navigate the risks and embrace the opportunities.
- 3:40pm** ● **Networking drinks | Level 10/27 Frome St, Adelaide SA 5000**

# Speakers

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### **Fiona Stapleton, Thomson Geer**

Fiona Stapleton is a Special Counsel at Thomson Geer Lawyers. Fiona has experience in providing taxation and commercial advice to a wide variety of clients including private and listed companies, high net worth individuals and private equity funds and enjoys working closely with clients to understand their commercial issues and objectives to deliver better outcomes.



### **Nick Costello, JBWere**

Nick is a director at JBWere. He is an investment professional with 15 years' experience in providing multi-asset class investment advice to High Net Worth families and Not-for-Profit organisations.



### **Raoul Stevenson, Nexia Edwards Marshall**

Raoul is a Partner in Nexia Edwards Marshall's Business Consulting and Taxation division. He has over 15 years' experience working with a broad range of clients, and provides services ranging from consulting to tax compliance and management accounting.



### **Lauren Rooney, Nexia Edwards Marshall**

Lauren is a Manager in Nexia Edwards Marshall's Business Consulting and Taxation division. Lauren's clients would describe her as hardworking and enthusiastic; her work is carried out to a high level which gives her clients confidence to do what they need to do. Her range of experience in different areas of accounting means she adapts quickly to different environments and software,



### **Chetan Trivedy, Nexia Edwards Marshall**

Chetan has extensive financial statement audit experience with proven credentials in leading and executing public and private audits having worked in the UK and Australia. Chetan has an excellent understanding of IFRS including a proven ability to work through complex technical accounting matters including, goodwill impairment, business combinations and inventory valuation.



### **Cassandra Daniells, Nexia Edwards Marshall**

Cassandra is proficient in building strong client relationships, taking a detailed hands-on approach to understanding her client's needs and providing them a value-added service each time. Cassandra has a breadth of experience gained from both working overseas in London and locally in Adelaide. Her varied portfolio covers public, PE backed, private and non-for-profit entities.