



Agenda

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External

Title:	Corporate Collective Investment Vehicle focus group meeting		
Issue date:	9 September 2022		
Venue:	WebEx Join the meeting Meeting number: 2650 356 9131 Meeting password: CCIV2022		
Event date:	14 September 2022	Start: 11:00am AEST	Finish: 12:30pm

Chair:	Sonya Lark	Facilitator:	Sonia Lark
Contact	Sonya Summers	Contact phone:	02 4725 7383

Attendees: names/section	ATO: David Baker – Director, Individuals and Intermediaries Craig Hughes – Director (A/g), Digital Wholesale & Integration Services Sonia Lark – Director (A/g), Digital Partnership Office Kate Harrison – Director (A/g), Public Groups and Internationals Blake Sly – Director, Public Groups and Internationals Sangitha Sivayogaraj – Director, Digital Wholesale & Integration Services Andrew Callaway – Public Groups and Internationals Irma Briggs – Individuals and Intermediaries Kareem El Attar - Digital Wholesale & Integration Services Brendan Kee - Digital Wholesale & Integration Services Kim McConaghy – Digital Wholesale & Integration Services Felicity-Ann Stokes – Digital Partnership Office Sonya Summers – Digital Partnership Office Andrei Florescu - Strategy, Design & Architecture Michelle Thomas – Solution Design Authority Dino Di Lorenzo – Individuals and Intermediaries Zdenka Janovic – Income Tax and Platform Support Rachel Phillips - Digital Wholesale & Integration Services Ben Woolfe - Digital Wholesale & Integration Services
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Industry:
 Shifa Akbar – Thomson Reuters
 Hao Chen - Shinewing
 Karl Ferrand - Taxlab
 Tully Holleley - PWC
 Kevin Johnson - Reckon
 Linda Kerhoulas – Thomson Reuters
 Daphne Lee – Wolters Kluwer
 Amy Li - Class
 Darren Mack - PWC
 Stephen O'Flynn – Shinewing
 Basem Reda – Thomson Reuters
 Scott Reid - MYOB
 Andrew Sprankling - Xero
 Michael Tong - MYOB
 Michael Tran – Wolters Kluwer
 Jack Wee - Catsoft
 Danna Zhang – Wolters Kluwer
 Kevin Zhang - Class

Apologies: ATO:
name/section Danny Figueiredo - Digital Partnership Office

Item	Topic	Presented by
1.	Welcome and Introductions	Sonia Lark
2.	Business requirements	Andrew Callaway
3.	Technical solution options	Sangitha Sivayogaraj and Ben Woolfe
4.	Group discussion	All
5.	Next steps	Sonia Lark
6.	Close	Sonia Lark