



SESCA

2021 CPD PROGRAMME

Accounting, taxation and business courses
in **South East** and **Southern** England

Quality, flexible accountancy and
business training at affordable prices

Your key to professional knowledge

2021 CPD PROGRAMME

2021 ONLINE COURSES PROGRAMME

DATE	COURSE	SPEAKER	PAGE	VENUE	TIME	B/P	CODE
2021	Why Power Query is the most important Excel development ever - even if you don't work with data!	S.Hurst	66	W	ANY	B/P	EX01A1
2021	Good Spreadsheet Practice: Excel Fundamentals	S.Hurst	67	W	ANY	B/P	EX02A1
2021	Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	68	W	ANY	B/P	EX03A1
2021	50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	69	W	ANY	B/P	EX04A1
2021	More Power to Your Pivot: Practical Uses for Excel Pivot Tables	S.Hurst	70	W	ANY	B/P	EX05A1
02 Mar	PAYE and National Insurance Update	A.Durrant	12	O	AM	B/P	MA02A1
02 Mar	A Practical Approach to Forms P11D	A.Durrant	13	O	PM	B/P	MA02B1
10 Mar	Introduction to Charity Accounts	B.Telford	50	O	AM	P	MA10A1
11 Mar	Trusts: Four Tax Efficient Case Studies and a Disaster	A.Fisher	28	O	AM	P	MA11A1
16 Mar	Introduction to Pension Scheme Accounts	B.Telford	51	O	AM	P	MA16A1
23 Mar	SRA Accounts Rules Update: The 'New' Rules and the Accountant's Report	J.Taylor	48	O	AM	P	MA23A1
30 Mar	Introduction to Housing Association Accounts and Audit	P.Herbert	53	O	AM	P	MA30A1
20 Apr	Accounting Update for Accountants in Business	G.Loveday	42	O	AM	B	AP20C1
20 Apr	Taxation Update for Accountants in Business	M.Jingles	8	O	PM	B	AP20D1
21 Apr	Annual IFRS Update	G.Loveday	44	O	AM	B/P	AP21C1
28 Apr	Pensions - What the Accountants Needs to Know	B.Trunchion	23	O	AM	P	AP28A1
06 May	The Accountant on the Farm - A Comprehensive Review	B.Trunchion / D.Missen	20	O	AM	P	MY06A1
13 May	Businesses in Trouble - Helping your client in times of crisis	D.Djanogly	61	O	AM	B/P	MY13A1
17 May	Taxation Update	G.Mooney	7	O	AM	P	MY17A1
17 May	Audit and Accounting Update	G.Loveday	40	O	PM	P	MY17B1
17 May	Accounting and Financial Reporting Update	G.Loveday	41	O	AM	P	MY17C1
17 May	Taxation Update	G.Mooney	7	O	PM	P	MY17D1
19 May	Housing Associations Accounting and Audit Update	P.Herbert	54	O	AM	P	MY19A1
20 May	A Practical Tax Brush up for Returners	A.Durrant	9	O	AM	P	MY20A1
20 May	A Practical Accounting Update for Returners	K.McCaffrey	43	O	PM	P	MY20B1
25 May	A Complete Guide to Tax and the Family	R.Martin	22	O	PM	P	MY25B1
27 May	A Complete Guide to Essential VAT for Charities	N.Owen	35	O	AM	B/P	MY27A1
28 Jun	Cyber Security and GDPR Update	S.Hill	65	O	PM	B/P	JN28B1
06 Jul	Accounting for and Auditing Academy Schools	P.Herbert	47	O	AM	P	JY06A1
07 Jul	Complete Guide to Acting for Small Business	M.Jingles	29	O	AM	B/P	JY07A1
14 Sep	Annual IFRS Update	G.Loveday	44	O	AM	B/P	SE14A1
14 Sep	Capital Gains Tax and Inheritance Tax Refresher	B.Trunchion	25	O	PM	P	SE14B1
16 Sep	Moving into Advisory Services	M.Lee	60	O	AM	P	SE16A1
22 Sep	Hot Topics in VAT	N.Owen	33	O	AM	B/P	SE22A1
23 Sep	A Practical Tax Brush up for Returners	A.Durrant	9	O	AM	P	SE23A1
23 Sep	A Practical Accounting Update for Returners	K.McCaffrey	43	O	PM	P	SE23B1
28 Sep	Complete Guide to Valuation of Unquoted Company Shares and Businesses	J.Nelder	59	O	PM	B/P	SE28B1
06 Oct	Charities Update	J.Poulter	57	O	PM	B/P	OC06B1
18 Oct	Topical Audit Problems and Solutions	J.Selwood	49	O	PM	P	OC18B1
20 Oct	Medical Taxation: Doctors and Dentists Refresher	B.Trunchion	24	O	AM	P	OC20A1
21 Oct	Pensions Accounting, Audit and Regulatory Update	P.Herbert	52	O	AM	P	OC21A1
03 Nov	Dealing with Common Property Transactions	D.Wootton	31	O	AM	B/P	NO03A1
03 Nov	Corporation Tax Update	G.Mooney	17	O	PM	B/P	NO03B1
16 Nov	Accounting Update for Accountants in Business	G.Loveday	42	O	AM	B	NO16A1
16 Nov	Taxation Update for Accountants in Business	M.Jingles	8	O	PM	B	NO16B1
30 Nov	Taxation Update	M.Ward	7	O	AM	P	NO30A1
30 Nov	Audit and Accounting Update	G.Loveday	40	O	PM	P	NO30B1
30 Nov	Accounting and Financial Reporting Update	G.Loveday	41	O	AM	P	NO30C1
30 Nov	Taxation Update	M.Ward	7	O	PM	P	NO30D1

SESCA Live Online Courses

Live Online Courses: Our live online CPD courses are available for anyone to attend from the comfort of their laptop/PC. The courses are run using Zoom. Just like face to face, you can ask questions during the course and the SESCO admin team will be online to try to answer any IT issues you may be experiencing with Zoom.

Each course is available to be booked either individually or using a Flexiticket. Delegates are emailed the course notes in pdf form and the Zoom link two days before the course date. You may request a hard copy of the notes to be sent to you after the course - simply email courses@sesca.co.uk with your request and address details.

Live Online Course Advantages: The courses are designed to be as close to being in the room as possible without the need to travel to a venue, saving you travel time and cost. Delegates are able to ask questions during the course using the chat box and receive the same expert training from speakers.

Delegates who attended our 2020 online courses have said "Very easy to attend on Zoom.", "I find the Zoom courses really good as you can learn from your desk and it saves the travel time." "It gives you access to courses that may not be running in your area." And "I had some reservations as to whether Zoom would work for this type of course and I was pleasantly surprised."

SESCA Recorded Online Excel Courses

Recorded Online Excel Courses: All our Excel courses are now available as recorded online courses, available at any time of the year. Email courses@sesca.co.uk to book your one month access. Each online recording is accompanied by a full set of notes (80+ pages) and example Excel workbooks so that you can work through the content at your own pace. Delegates are emailed the course notes and weblink with one month access code.

Recorded Online Course Advantages: The courses are designed to replace 3 hour face-to-face lectures but each one is divided into a series of chapters of about 20 minutes so you can do as much or as little as you want over a period of one month.

Rather than just replacing the face-to-face experience, presenting these courses online allows us to make them even more convenient, accessible and useful. Some of the feedback from our online courses highlight these advantages: "This as a recorded session was ideal as it would allow me to pause and apply techniques straightaway to my files, it also allowed me to rewind to go over things for a better understanding. I would definitely do this form of training again." "I thought this was a great course - it touched on some really good points and the more detailed guides to go with it mean that I can go back and test/play around with the functionality in my own time which is really useful. I would definitely recommend this course to others."

2021 SOUTH EAST, SOUTHERN AND THAMES VALLEY BOOKING FORM

Contact (please give delegate names if known overleaf)

Mr/Mrs/Miss Initials Surname

Firm/Company: _____

Address _____

Tel _____ Email _____

District Society
(please tick)

South East ☐

Southern ☐

Thames ☐

Fees

	Fee	VAT	Fee+VAT	No.	Total
4 place Flexiticket	£320.00	£64.00	£384.00		
12 place Flexiticket	£740.00	£148.00	£888.00		
25 place Maxiticket	£1470.00	£294.00	£1764.00		
Individual course (half day)	£110.00	£22.00	£132.00		
Whole day course (p34)	£185.00	£37.00	£222.00		
'Brush-ups' with discount (pages 9 & 43)	£55.00	£11.00	£66.00		
IT courses with Faculty discount (p66-70)	£60.00	£12.00	£72.00		
Charities courses with discount (pages 57 and 58) – both courses	£110.00	£22.00	£132.00		
Tax Conference	£350.00	£70.00	£420.00		
Tax Conference early booking discount (booked and paid for by 30/04/21)	£330.00	£66.00	£396.00		

SESCA

SESCA is the trading name of SESCO Ltd, formerly SESCO Enterprises Ltd
A subsidiary of South Eastern Society of Chartered Accountants Ltd

Website: sesca.co.uk

Email: courses@sesca.co.uk

Tel: 01737 223999

Booking conditions: Face to face courses: The course fee covers all documentation, which will be provided on registration, and refreshments. **Online courses:** The course fee covers all documentation which will be emailed 2 days before the course date.

All courses/conferences: We regret no refunds can be made on course fees other than in exceptional circumstances. Flexitickets are only valid on events which fall within the validity period of the ticket. All places are subject to availability and receipt of notification of attendance at least 6 days before the course. We cannot guarantee places on any course. Notice of cancellation must be received and acknowledged by email 2 clear working days before the course to enable a place to be used again within the validity period of the ticket. We reserve the right to make changes, including cancellation to any course/conference. No responsibility for loss occasioned to any person acting or refraining from acting as a result of any of the information in the material can be accepted by the speakers, SESCO Ltd, ICAEW Chartered Accountants South East, Southern, and Thames Valley. We cannot be held responsible for any personal belongings left at any course venue.

Prices frozen
for 2021
Book all 2021
courses at
2020 prices

All bookings must be accompanied by payment. A VAT invoice will be issued with your confirmation email. Please make cheques payable to:

SESCA Ltd

Details for BACS payment:

a/c 10771791

Sort code: 20-23-97

Please quote company name when paying by BACS

Cheque enclosed: £

Signed _____

Date _____

Please give course and delegate details overleaf. On the Flexiticket, bookings can be made at any time, but the courses must take place within the validity period of your ticket.

Return address:

SESCA Ltd,

2b Chart House, Effingham Road,
Reigate, Surrey RH2 7JN



SESCA

Delegate Information

Please give delegate bookings, names and email addresses if known below. Course codes may be found at the foot of each course page and those for your district society and online courses are given on the programme on the inside front flap. Please scan and email this form to courses@sesca.co.uk. For larger bookings with multiple delegates please download the excel booking spreadsheet from the website sesca.co.uk

On the Flexiticket, course places must be cancelled two clear working days before the course to enable the place to be used on another course which falls within the validity period of your ticket. Alternatively, you may request the course notes. If we do not receive notification of cancellation, you will be sent the course notes and a place will be deemed used on your ticket. Early booking on the audit, accounting and taxation updates is strongly advised as these become over-subscribed.

Mr/Mrs/
Miss/Ms

Forename

Surname

Course Code

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We take your privacy very seriously. Our privacy policy explains how we use any information we collect about you when you use our website or purchase a Flexiticket, course or conference place from us. For more information please read our privacy policy statement available on our website at sesca.co.uk/privacy-policy-statement.

TAXATION COURSES PROGRAMME

See also 'Specialist' section (pages 55-70) for specialist topics with taxation content

Course	Speaker(s)	Online/District				B/P	Page
		Online	SE	SO	TV		
*Taxation Update: Spring and Autumn	G.Mooney B.Trunchion M.Ward	●	●	●	●	P	7
* Taxation Update for Accountants in Business: Spring and Autumn	M.Ingles	●	●	●	●	B	8
A Practical Tax Brush Up for Returners	A.Durrant	●				P	9
Topical Tax Issues for Owner Managed Businesses	D.Wootten		●	●		B/P	10
Complete Guide to Tax Planning for Small Business	M.Ward		●	●		B/P	11
PAYE and National Insurance Update	A.Durrant	●	●		●	B/P	12
A Practical Approach to Forms P11D	A.Durrant	●	●			B/P	13
Payroll Services for Clients: Practical Problems	A.Durrant		●	●		P	14
A Practical Introduction to Payroll	A.Durrant			●		P	15
Complete Guide to IR35	R.Martin		●	●	●	P	16
Corporation Tax Update	G.Mooney	●		●	●	B/P	17
HMRC's Investigatory Powers: Topical Issues	A.Gotch			●		B/P	18
After Brexit and the Transition – The New Tax Environment	J.Mindell			●		B/P	19
The Accountant on the Farm – A Comprehensive Review	B.Trunchion D.Missen	●				P	20
The Essential Guide to Importing and Exporting	M.Greenbaum			●		B/P	21
Complete Guide to Tax and the Family	R.Martin	●		●		P	22
Pensions: What the Accountant Needs to Know	B.Trunchion	●		●		P	23
Medical Taxation: Doctors and Dentists Refresher	B.Trunchion	●				P	24
Capital Gains Tax and Inheritance Tax Refresher	B.Trunchion	●				P	25
Capital Taxes: Four Tax Efficient Scenarios and a Disaster	A.Fisher			●		B/P	26
Capital Taxes Update	M.Ward		●	●	●	B/P	27
Trusts: Four Tax Efficient Case Studies and a Disaster	A.Fisher	●		●		P	28
Complete Guide to Acting for Small Businesses	M.Ingles	●	●			B/P	29
Construction Industry Tax Refresher	T.Palmer		●	●		B/P	30
Dealing with Common Property Transactions	D.Wootten	●		●		B/P	31
VAT Essentials	D.Wootten		●	●		B/P	32
Hot Topics in VAT	N.Owen	●	●	●		B/P	33
Complete Guide to International VAT Issues	N.Owen		●	●		B/P	34
Complete Guide to Essential VAT for Charities	N.Owen	●				B/P	35
Complete Guide to VAT and Property Transactions	N.Owen		●	●		B/P	36
Complete Guide to VAT in the Construction Industry	N.Owen		●	●		B/P	37
Topical Tax Tips and Pitfalls	R.Benneyworth		●			B/P	38

KEY: B = interest to business P = interest to practice

* early booking on these courses is strongly recommended as they are invariably oversubscribed

HALF YEARLY TAXATION UPDATES

Objectives: These courses aim to provide busy practitioners and their staff with a practical and intensive review of developments over the last six months as well as changes likely to occur in the near future. Whilst the summer and winter courses are stand alone updates, maximum benefit is gained by attending both.

Who should attend: Partners in small and medium sized practices and their professional staff.

Topics: Specific topics will be set nearer the time in order to ensure up to the minute coverage. Previous topics have included:

- Finance Act/Bill
- Topical tax administration and investigation points such as MTD and IR35
- Recent tax tribunal and court cases
- HMRC promulgations
- Developments in VAT
- Planning and practical points arising in the period

Speakers: (see table below)

Giles Mooney BSc(Hons) FCA CTA, Managing Director of PTP Ltd, entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

Bob Trunchion MSc FCA CTA TEP qualified in the audit department of a big four firm, but soon moved to their Corporation Tax Department. His move to MacIntyre Hudson in 1985 has rounded off his knowledge so that he is well versed in all aspects of tax. As well as advising clients on a consultancy basis, Bob is mainly involved in heading up tax training both in the firm and in the specialist training arm MacIntyre Hudson Advisory Services.

Mark Ward LLB CTA is a very experienced lecturer. He has an ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style.

Dates, venues and timing

Set out below are the dates and venues for all the updates. **Early booking on these courses is strongly recommended.** The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees). The timing for all courses is:

AM	Registration: 09:00	Course starts: 09:30	Coffee: 11:00	Course ends: 12:30
PM	Registration: 13:00	Course starts: 13:30	Coffee: 15:00	Course ends: 16:30

South East		Time	Speaker	
Friday 7 May	PM	MW	Crowne Plaza Felbridge	Code: MY07B1
Wednesday 9 June	AM	GM	Mercure Maidstone Great Danes Hotel	Code: JN09A1
Wednesday 9 June	PM	GM	Mercure Maidstone Great Danes Hotel	Code: JN09D1
Tuesday 23 November	PM	BT	Crowne Plaza Felbridge	Code: NO23B1
Monday 29 November	AM	MW	Mercure Maidstone Great Danes Hotel	Code: NO29A1
Monday 29 November	PM	MW	Mercure Maidstone Great Danes Hotel	Code: NO29D1
Southern		Time	Speaker	
Thursday 10 June	AM	MW	Botley Park Hotel, Botley	Code: JN10A1
Thursday 10 June	PM	MW	Botley Park Hotel, Botley	Code: JN10D1
Wednesday 1 December	AM	GM	Botley Park Hotel, Botley	Code: DE01A1
Wednesday 1 December	PM	GM	Botley Park Hotel, Botley	Code: DE01D1
Thursday 9 December	PM	MW	Village Hotel, Bournemouth	Code: DE09B1
Thames		Time	Speaker	
Monday 24 May	PM	GM	Sindlesham Court, Wokingham	Code: MY24B1
Wednesday 17 November	AM	GM	Sindlesham Court, Wokingham	Code: NO17A1
Live Online		Time	Speaker	
Monday 17 May	AM	GM	Live online using Zoom	Code: MY17A1
Monday 17 May	PM	GM	Live online using Zoom	Code: MY17D1
Tuesday 30 November	AM	MW	Live online using Zoom	Code: NO30A1
Tuesday 30 November	PM	MW	Live online using Zoom	Code: NO30D1

HALF YEARLY TAXATION UPDATES FOR ACCOUNTANTS IN BUSINESS

Speaker: Martyn Ingles BSc FCA CTA

Objectives: All ICAEW members are required to undertake CPD. This course is specifically designed to meet the CPD needs of accountants working in business. The emphasis is on recent developments in company and employee taxation as well as relevant VAT changes. Comprehensive notes are provided for future reference. The courses are run half yearly in all three societies.

Who should attend: Those working in industry and commerce who need to keep abreast of current tax developments.

Topics:

- Budget and Finance Act changes
- Current developments in company taxation
- Topical employee taxation issues
- Value Added Tax developments
- HMRC pronouncements
- Recent tax cases

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MHA MacIntyre Hudson. He is now a Consultant with MacIntyre Hudson Advisory Services LLP. Martyn's main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

Dates, venues and timing: Set out below are the dates and venues for all the updates. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees). The tax courses are run in the afternoon. In the morning there is a similar accounting update (see page 42 for details). The timing for all courses is as follows:

Registration: 13:00	Course starts: 13:30	Coffee: 15:00	Course ends: 16:30
South East			
Friday 21 May	Denbies Wine Estate, Dorking		Code: MY21B1
Tuesday 15 June	Mercure Maidstone Great Danes Hotel		Code: JN15B1
Friday 19 November	Denbies Wine Estate, Dorking		Code: NO19B1
Monday 22 November	Mercure Maidstone Great Danes Hotel		Code: NO22B1
Southern			
Wednesday 16 June	Botley Park Hotel, Boorley Green, Botley		Code: JN16B1
Wednesday 24 November	Botley Park Hotel, Boorley Green, Botley		Code: NO24B1
Thames			
Thursday 17 June	Sindlesham Court, Wokingham		Code: JN17B1
Thursday 18 November	Sindlesham Court, Wokingham		Code: NO18B1
Live Online			
Tuesday 20 April	Live online using Zoom		Code: AP20D1
Tuesday 16 November	Live online using Zoom		Code: NO16B1

A PRACTICAL TAX BRUSH-UP FOR RETURNERS

Speaker: Alexandra Durrant FCA

Objectives: This annual course is designed for accountants returning to the professional workplace after a career break, providing an overview of the principles of PAYE and NIC, VAT and corporation tax. This is not a detailed technical course. It will give the delegates the confidence required to say "I can do that" when returning to the workplace. The basic principles of the three topics will be covered, most of which will already have been learnt and understood by delegates but which may not have been used for some time. The course will cover the more practical aspects of each subject area.

Who should attend: Returners to the professional workplace, and "old stagers", who may be dealing with payroll, VAT returns and corporation tax computation work and who need to be brought up to date.

Topics:

- A review of RTI, PAYE and NIC procedures
- Update on tax rates, tax bands, NI thresholds and NI rates 2021/22
- Statutory payments update – SSP, SMP, SAP, SPP and shared parental pay
- An update on benefits and expenses following recent changes
- Basic corporation tax computation and the disallowed items
- Capital allowances update, loss relief and R&D tax credit
- VAT, the registration and deregistration point, use of VAT schemes, MTD and VAT and the common pitfalls on reclaiming VAT

Speaker: Alexandra Durrant is a chartered accountant and runs the practice Alexandra Durrant Limited in East Grinstead. She provides audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She writes and lectures regularly on payroll matters.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

* Please note: concessions on the standard fee for this course and the audit and accounting technical 'brush-up' (see page 43) are available for delegates not currently in work. For details phone 01737 223999.

Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
Live Online			
Thursday 20 May	Live online using Zoom	CODE: MY20A1	
Thursday 23 September	Live online using Zoom	CODE: SE23A1	

TOPICAL TAX ISSUES FOR OWNER MANAGED BUSINESSES

Speaker: Dean Wootten FCA CTA

Objectives: This course aims to cover the practicalities of dealing with close companies in 2021 and beyond. Planning issues will be discussed and supplemented by practical examples.

Who should attend: Anyone providing advice to close companies.

Topics:

- Dealing with issues post Covid-19
- Tax efficient profit extraction in 2021 and beyond
- Tax breaks and incentives when working from home
- Common benefits including cycle to work scheme
- Alphabet shares
- Dividend waivers
- Director loan accounts
- When to wind a company up and how
- Purchase of own shares
- Issues with the new off-payrolling rules in the private sector
- Recent cases that will impact close companies

Topics are flexible and new areas may be added.

Speaker: Dean Wootten has been involved in tax training for many years and lectures and consults on a wide variety of tax matters. Dean started his career as a Chartered Accountant, qualifying with Grant Thornton in 1988. Dean then spent two years overseas with KPMG before returning to a medium sized provincial firm in Sussex. Shortly after returning to the UK, Dean qualified as an Associate of the Institute of Taxation in 1991. Whilst in practice Dean gained valuable experience including five years at partner level. The experience gained enables Dean to focus his lecturing on the practical aspects of the issues presented.

South East					Southern				
Date	Weds 29 September				Date	Thurs 4 November			
Venue	Mercure Maidstone Great Danes Hotel				Venue	Solent Hotel Whiteley, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee				Code: SE29A1	Course fee: £110+VAT See p4 for Flexi fee				Code: NQ04A1

COMPLETE GUIDE TO TAX PLANNING FOR SMALL BUSINESSES

Speaker: Mark Ward LLB CTA

Objectives: This course aims to familiarise participants with the income tax, corporation tax, capital gains tax and inheritance tax matters that affect family businesses and their owners, and to make them aware of the tax planning opportunities that will enable their clients to minimise their current and potential tax liabilities.

Who should attend: Anyone advising SMEs on taxation.

Topics: As this course is designed to be topical specific topics may vary, however typically the course covers:

- Tax planning for sole traders and partnerships
- Extracting profits from the family company
- Anti-avoidance obstacles: IR35 and off-payroll working, settlements rules etc.
- Corporation tax mitigation
- Realising the value/passing on the family business - CGT and IHT implications

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium size firm. He has been lecturing on a wide variety of tax matters for over 25 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical and understandable style, means Mark is much in demand on the lecturing circuit.

South East					Southern				
Date	Tuesday 6 July				Date	Weds 24 February			
Venue	Crowne Plaza Felbridge				Venue	Solent Hotel, Whitely, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: JY06B1		Course fee: £110+VAT See p4 for Flexi fee			Code: FE24A1	

PAYE AND NATIONAL INSURANCE UPDATE

Speaker: Alexandra Durrant FCA

Objectives: This course is designed to review the changes in the last year and those planned for the future in relation to PAYE and National Insurance legislation. It will also highlight some problem areas in payroll including employment status, taxation of benefits in kind and the changes to maternity, paternity and adoption provisions.

Who should attend:

- General practitioners and their staff
- General practitioners as employers
- Employees of companies with responsibility for payroll and related matters
- Returners to work needing an update on PAYE/NIC

Topics: New topics to be added if relevant

- RTI (Real Time Information): update and issues
- PAYE update for 2021/22
- National insurance for 2021/22
- Update on relevant employment issues
- National Minimum Wage
- Automatic enrolment update and issues
- Review of voluntary payrolling of benefits
- Update on maternity, paternity, adoption and shared parental leave/pay provisions
- IR35 and off payroll working 2021/22
- Review of recent HMRC consultation relating to payroll matters

Speaker: Alexandra Durrant is a chartered accountant and runs the practice Alexandra Durrant Limited in East Grinstead. She provides audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She writes and lectures regularly on payroll matters.

Live Online					South East					Thames				
Date		Tuesday 2 March			Date		Thursday 4 March			Date		Monday 15 March		
Venue		Live online using Zoom			Venue		Mercure Maidstone, Great Danes Hotel			Venue		Coppid Beech Hotel, Binfield, Bracknell		
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: MA02A1			Course fee: £110+VAT See p4 for Flexi fee		Code: MA04A1			Course fee: £110+VAT See p4 for Flexi fee		Code: MA15A1		

A PRACTICAL APPROACH TO FORMS P11D

Speaker: Alexandra Durrant FCA

Objectives: Your clients may think they can ignore P11Ds as they only pay “business expenses” – are you sure?

- To remind delegates of HMRC P11D reporting requirements, the filing deadlines and potential fines
- To highlight where and how reporting can be minimised thereby saving clients/businesses costs
- To clarify just which expenses have to be reported
- To review the method of calculating the value for benefits in kind using either the “cash equivalent” or the special rules for the various benefits that employers may provide to employees

Who should attend:

- Practitioners: partners and staff who undertake P11D preparation for clients
- Accountants in business responsible for their company P11D forms

Topics:

- Why P11D forms are required
- Filing deadlines and penalties
- What expenses and benefits must be reported
- How to reduce reporting by use of:
 - Qualifying business expenses
 - Non-taxable payments and benefits
 - PAYE settlement agreements
- Review of the voluntary payrolling of benefits in kind – how does it work?
- Practical guidance on calculating the taxable value of benefits in kind

Speaker: Alexandra Durrant is a chartered accountant and runs the practice Alexandra Durrant Limited in East Grinstead. She provides audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She writes and lectures regularly on payroll matters.

Live Online					South East				
Date	Tuesday 2 March				Date	Thursday 4 March			
Venue	Live online using Zoom				Venue	Mercure Maidstone, Great Danes Hotel			
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MA02B1		Course fee: £110+VAT See p4 for Flexi fee			Code: MA04B1	

PAYROLL SERVICES FOR CLIENTS: PRACTICAL PROBLEMS

Speaker: Alexandra Durrant FCA

Objectives: Running payrolls for clients isn't simply entering data and pressing a button! Payroll staff need to understand the rules. This is a practical course designed to cover the issues that can arise when running payrolls for clients. It will highlight potential problem areas such as casuals, "self-employed", calculating holiday pay, maternity rights, terminations and benefits and expenses pitfalls.

Who should attend:

- Practitioners and staff overseeing or running payrolls for clients
- Practitioners as employers themselves
- Employees of businesses with responsibility for payrolls

Topics: These are flexible and new issues may be added, however likely content will be:

- Penalty regime relating to payroll
- Dealing with casuals, zero hours workers and "self-employed"
- Impact of IR35 rules on payroll
- Termination of employment update, redundancy process and payroll input
- Holiday entitlement and calculation of holiday pay
- Update on other employment issues relating to payroll
- Pay and other rights for employees on family related leave
- The voluntary payrolling of benefits in kind
- Auto enrolment for pensions – payroll involvement
- Review of recent HMRC consultations on payroll matters

Speaker: Alexandra Durrant is a chartered accountant and runs the practice Alexandra Durrant Limited in East Grinstead. She provides audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She writes and lectures regularly on payroll matters.

South East					Southern				
Date		Wednesday 12 May			Date		Tuesday 11 May		
Venue		Mercure Maidstone, Great Danes Hotel			Venue		Solent Hotel, Whiteley, Fareham		
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: MY12A1			Course fee: £110+VAT See p4 for Flexi fee		Code: MY11A1		

A PRACTICAL INTRODUCTION TO PAYROLL

Speaker: Alexandra Durrant FCA

Objectives: This new course is designed to give attendees a good foundation in the payroll process. It will be invaluable for those working in payroll departments both in business and in practice. After listening there will be an opportunity to test new knowledge.

Who should attend: Anyone new to payroll wanting to gain knowledge and expertise. HR staff wanting to acquire a better understanding of the payroll process, payroll managers/staff who would like to enhance their understanding.

Topics:

- The payroll process
- PAYE
- National Insurance
- Tax Codes
- Statutory Pay
- Plenty of examples

Speaker: Alexandra Durrant is a chartered accountant and runs the practice Alexandra Durrant Limited in East Grinstead. She provides audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She writes and lectures regularly on payroll matters.

Southern				
Date	Thursday 7 October			
Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: OC07A1	

COMPLETE GUIDE TO IR35

Speaker: Ros Martin BSc PhD CTA

Objectives: It is all change in 2021 for those providing services through intermediaries with an extension of the provisions first introduced in the public sector in 2017. This course is designed for the delegate who would like a refresher on the basic IR35 provisions and an update on the new rules. We will also consider associated issues when dealing with intermediaries.

Who should attend: All accountants in general practice who advise personal service companies in relation to their tax affairs.

Topics:

- The basic principles of IR35
- The calculation of the deemed employment income charge
- Changes in deductibility of travelling expenses
- The new rules from 2021
- Managed service company provisions
- The use of umbrella companies and other intermediaries

Speaker: Ros Martin spent her early career working for the Inland Revenue in a variety of jobs and dealing with a wide range of different areas of tax. Since leaving she has worked as a lecturer and consultant covering all areas of direct tax and Stamp Duty Land Tax. Having a consultancy background enables the training to be focussed on current areas of concern and the practical implications of topics being discussed. Interaction is always encouraged allowing delegates the opportunity to use their real life problem/query to work through relevant areas of the course. The consultancy work undertaken by Ros gives her an opportunity to understand the key issues of concerns for professionals and consider the practical aspects of the application of legislation.

South East				
Date	Wednesday 30 June			
Venue	Denbies Wine Estate, Dorking			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: JN30A1		

Southern				
Date	Tues 21 September			
Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: SE21A1		

Thames				
Date	Wednesday 21 April			
Venue	Coppid Beech Hotel, Binfield, Bracknell			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee		Code: AP21B1		

CORPORATION TAX UPDATE

Speaker: Giles Mooney BSc (Hons) FCA CTA

Objectives: Recent Finance Acts have introduced a number of changes to the corporation tax regime, exempting some capital gains, allowing further relief for companies' expenditure and extending the application of transfer pricing. Consultation continues on reform of corporation tax, whilst at the same time challenges are being brought in the courts on the basis of conflict with European law. This course will bring participants up to speed on the familiar and not so familiar elements of corporation tax. It will enable any practitioner who deals with companies or their directors to discuss the current issues and point the way to resolving them.

Who should attend: Anyone advising SMEs on taxation.

Topics: Will be drawn from:

- Taxable profits
 - Interface between accounting principles and tax
 - Specific problem areas
 - The intangible assets regime
 - Capital allowances
 - Transfer pricing
- The corporation tax charge
 - Rates of tax
- Loss reliefs
 - Identifying the options and using them efficiently
- Capital gains
 - Computation and reliefs
- Groups of companies
 - The substantial shareholding exemption
- Close companies
 - Loans to participators
 - Personal service companies – IR 35
- Administration of corporation tax
 - The CT 600 form
 - Payments of corporation tax
 - Self assessment and enquiries

Speaker: Giles Mooney, Managing Director of PTP Ltd, is a Chartered Accountant and Chartered Tax Adviser and has been involved in UK tax training for many years. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

Live Online				
Date	Weds 3 November			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee		Code: NO03B1		

Southern				
Date	Wednesday 21 April			
Venue	Solent Hotel Whiteley, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: AP21A1		

Thames				
Date	Weds 6 October			
Venue	Coppid Beech Hotel Binfield, Bracknell			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: OC06A1		

HMRC'S INVESTIGATORY POWERS: TOPICAL ISSUES

Speaker: Andrew Gotch BA MA CTA (Fellow)

Objectives: HMRC's compliance initiatives are multiplying, and their statutory powers increase annually. With pressure from Government to collect more and more money, practitioners can expect interventions from HMRC on an ever-increasing scale. The stress and cost for clients and practitioners alike can be substantial.

This lecture will review current developments in the investigatory environment and consider how clients can be protected from HMRC's attentions – and what can be done to assist clients in cases where a tax investigation begins.

Who should attend: Partners and all those dealing with HMRC compliance interventions.

Topics:

- The scope of compliance checks and enquiries
- Discovery and time limits for assessments
- HMRC's information powers – scope and limitations
- Dealing with interventions in practice
- Settling with HMRC
- Penalties
- Appealing HMRC decisions – ADR and Tribunals

Speaker: Andrew Gotch practices as a Chartered Tax Adviser, CEDR Mediator, lecturer and author through his firm TaxFellowship, advising and representing clients, contributing articles to the professional press and lecturing throughout the UK. He is co-founder of TaxAction Consulting Limited, the leading national tax advisory service for professional firms. He is the Consultant Editor for the Employment Taxation section of LexisNexis' online TolleyGuidance.

Andrew is closely involved with the CIOT's technical work, and is immediate past Chairman of the Owner Managed Businesses Technical Sub-Committee, in which capacity he contributes to many consultations and fora with HMRC, most recently on Alternative Dispute Resolution.

Southern				
Date	Thursday 29 April			
Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: AP29A1	

AFTER BREXIT AND THE TRANSITION – THE NEW TAX ENVIRONMENT

Speaker: Jeremy Mindell BA (Hons) CTA CIPD

Objectives: The end of the transition period on 31 December 2020 will see significant divergence between the EU and the UK. This seminar informs advisers about the tax issues, which will become critical, once the UK is no longer part of the EU tax regime.

The EU has a significant impact on both direct and indirect taxation. The EU sets Customs policies through the application of the Common External Tariff. It provides the framework for VAT. Its powers in terms of Direct taxation are less well known although its State Aid powers affect both Income Tax and Corporation Tax. The Parent/Subsidiary Directive and the freedom of movement of capital have simplified the tax treatment of dividends. This area is likely to become more complicated.

This seminar reviews the EU's current tax powers and what changes when the transition period ends. It will also explain government measures to ease any transition and what steps businesses should take to protect their interests.

Who should attend: Any professional who deals with VAT, Customs, Corporation Tax, International tax and NIC as well as tax efficient investments.

Topics:

- State Aid
- Transfer Pricing and Profit Fragmentation for SME's
- Non-discrimination
- Social Security/ NIC agreements
- APR and woodlands
- FHL and other tax efficient investments
- Payments and receipt of dividends
- VAT—new freedoms
- Customs arrangements

Speaker: Jeremy Mindell entered the world of taxation after spending a couple of years in his family business. He started with Coopers & Lybrand and for the next 15 years was in three of the "Big Four" accountancy firms. He ended up as a Senior Manager with Deloitte & Touche, having worked issues such as profit-related pay, share schemes, expatriate tax, tax investigations, reward management, US taxation, transfer pricing and corporate tax. He was attracted by the opportunity to go in-house in 2001.

From 2013, Jeremy set up his own consultancy and lecturing business. Away from work, Jeremy likes cricket, history, skiing, tennis and gardening. He gives lectures on history which helps keep his presentation skills fresh.

Southern				
Date	Wednesday 17 March			
Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MA17B1	

THE ACCOUNTANT ON THE FARM – A COMPREHENSIVE REVIEW

**Speakers: Bob Trunchion MSc FCA CTA TEP
and David Missen BA FCA CTA**

Objectives: Are we about to see an agricultural revolution, either a brave new post-Brexit world or the end of UK agriculture as we know it? This intensive half day course will explore the challenges and issues faced by farming and rural communities and the solutions and opportunities available. It is aimed at keeping you up to date on what matters in this specialist sector.

Who should attend: Accountants already acting for this type of client, who have at least a basic knowledge of the subject, and are looking for a technical update and refresher would benefit most. It will also be suitable for those who would like an understanding of the specific problems encountered in the sector.

Topics:

- The state of UK Agriculture in 2021 – an overview after Brexit and trade deals
- Subsidies and farm economics after the Agriculture Act
- Inheritance tax and capital gains tax refresher
- Structures, successions, trusts, pensions, incorporation and other nitty gritty problems with HMRC etc.
- Capital Tax planning – the dos and don'ts
- Business and Agricultural Property – 100% relief, are you sure?

Speakers: Bob Trunchion qualified in the audit department of a big four firm, and soon after moved to their Corporation Tax Department. His move to MacIntyre Hudson in 1985 has rounded off his knowledge so that he is well versed in all aspects of tax. As well as advising clients on a consultancy basis, he is deeply involved in tax training, Bob has appeared on national radio and television talking about IHT. He has a wide range of tax knowledge and lectures on a range of subjects including the tax implications of buying and selling companies, capital taxes planning, trusts and share valuation work. Bob is also a specialist in a number of industries or niches such as farmers and the medical profession.

David Missen is a consultant at MHA Larking Gowen which he joined in 1983, he specialises in agriculture and rural issues, he also heads up the agricultural specialisation at MHA. He is a founder member and past chairman of the ICAEW Farming and Rural Business Group, past editor of its newsletter, and co-author of the 2014 Wolters Kluwer publication *Agriculture: An industry Accounting and Auditing Guide*. He speaks regularly on local radio and TV on rural and farming issues and is a part time farmer in his own right.

Live Online				
Date	Thursday 6 May			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MY06A1	

THE ESSENTIAL GUIDE TO IMPORTING AND EXPORTING

Speaker: Malcolm Greenbaum ACA CTA

Objectives: This session will provide delegates with the information they need to understand the processes needed to successfully import and export goods complying with all tax and administrative requirements, together with an understanding of how this differs from the processes for intra-EU supplies.

Cross-border supplies of services will be covered to the extent necessary to highlight the differences to supplies of goods, and to cover businesses which supply goods and services, sometimes together (e.g. supply and install contracts).

Who should attend: Those responsible for importing and exporting goods for their business and those who advise such businesses.

Topics:

- Import preparation and administration
- Duties and VAT and how they are collected
- Export administration
- Conditions to zero-rate exports of goods including indirect exports
- Comparison to intra-EU supplies of goods
- How the treatment of goods differs to services

Speaker: Malcolm Greenbaum is a UK Chartered Accountant and Chartered Tax Advisor. He was previously Director of Finance and Taxation Programmes at BPP Professional Education and has delivered IFRS, US GAAP, UK Tax and VAT training to a multitude of organisations world-wide since 1992.

Malcolm has particular experience in delivering bespoke training programmes to multi-nationals in the financial services, transport and energy sectors as well as delivering UK tax and VAT update programmes to accounting and law firms. He is passionate about training and his enthusiasm ensures that the participants enjoy the learning experience whilst gaining knowledge through their engagement in the sessions and through encouraging them to ask questions and discuss practical issues they may have.

Southern				
Date	Thursday 29 April			
Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: AP29B1	

COMPLETE GUIDE TO TAX AND THE FAMILY

Speaker: Ros Martin BSc PhD CTA

Objectives: This course is designed for the delegate who would like a refresher and update on many family tax planning opportunities covering various taxes at various stages of life and business to ensure they are dealing with their clients' tax affairs in the most tax efficient manner. The course will inspire delegates to be more pro-active when dealing with their clients, in looking at their current and potential exposure to tax, and show ways in which we can assist our clients and thus grow our practice. The course will include a review of relevant tax cases to consider when planning and will include numerous examples and illustrations to make this a practical and informative course.

Who should attend: All accountants in general practice who advise families on their tax affairs.

Topics:

- Children's income and gains
- Family provision - in a practical and tax efficient manner
- Husband and wife tax planning
- Settlements legislation – avoiding being caught by the anti-avoidance legislation
- Residences - tax planning for the family home and other property
- Tax implications of Separation and Divorce
- Pensions
- The sale of a business and other exit planning for the business
- IHT mitigation for succession - including wills and trusts

Speaker: Ros Martin spent her early career working for the Inland Revenue in a variety of jobs and dealing with a wide range of different areas of tax. Since leaving she has worked as a lecturer and consultant covering all areas of direct tax and Stamp Duty Land Tax. Having a consultancy background enables the training to be focussed on current areas of concern and the practical implications of topics being discussed. Interaction is always encouraged allowing delegates the opportunity to use their real life problem/query to work through relevant areas of the course. The consultancy work undertaken by Ros gives her an opportunity to understand the key issues of concerns for professionals and consider the practical aspects of the application of legislation.

Live Online					Southern				
Date	Tuesday 25 May				Date	Tuesday 7 December			
Venue	Live online using Zoom				Venue	Solent Hotel, Whitely, Fareham			
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MY25B1		Course fee: £110+VAT See p4 for Flexi fee			Code: DE07B1	

PENSIONS – WHAT THE ACCOUNTANT NEEDS TO KNOW

Speaker: Bob Trunchion MSc FCA CTA TEP

Objectives: With people living to a much greater age, various governments, to try to encourage people to save for the future, changed the pensions' regime dramatically over the years. The system remains horrendously complex, but the rules present many opportunities. The course will look at the world of pensions to see how they impact upon clients especially in the area of retirement and estate planning. It is not a financial services course and will not be dealing with products from a financial services aspect but will be looking at how the latest available products can assist the tax planner!

It will look at Pensions reform in the light of the 2020 Budget for the "post covid" era.

Who should attend: Partners and staff involved in the provision of advice to clients particularly in the area of estate planning and related items.

Topics:

- Contributions – quantum and pitfalls – Lifetime limits, Annual Allowances, Employer contributions – a quick reminder
- Operation of the scheme including what happens on retirement
- Benefits including taxation problems
- Planning advice – not just registered pension schemes
 - How is ER and BPR developing alongside pensions
 - Why spend your pension when you could spend your ISAs?
 - Third party contributions
 - Capital Tax planning in the light of the changes – is it more counter intuitive than you think?

In view of the huge amount of material covered in the above points, the course will not be dealing with QROPs nor will it deal with Auto Enrolment.

Speaker: Bob Trunchion qualified in the audit department of a big four firm, and soon after moved to their Corporation Tax Department. His move to MacIntyre Hudson in 1985 has rounded off his knowledge so that he is well versed in all aspects of tax. As well as advising clients on a consultancy basis, he is deeply involved in tax training, Bob has appeared on national radio and television talking about IHT. He has a wide range of tax knowledge and lectures on a range of subjects including the tax implications of buying and selling companies, capital taxes planning, trusts and share valuation work. Bob is also a specialist in a number of industries or niches such as farmers and the medical profession.

Live Online					Southern				
Date	Wednesday 28 April				Date	Tues 21 September			
Venue	Live online using Zoom				Venue	Basingstoke Country Hotel			
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: AP28A1		Course fee: £110+VAT See p4 for Flexi fee			Code: SE21B1	

MEDICAL TAXATION: DOCTORS AND DENTISTS REFRESHER

Speaker: Bob Trunchion MSc FCA CTA TEP

Objectives: People often link dealing with the above two professions as being the same. Whilst there are similarities, this is fundamentally wrong – there are many differences and these can have considerable effects on the advice required. However, dealing with these professionals can be very rewarding. In this rapidly changing and increasingly competitive niche market, it is essential that accountants are aware of the most recent developments. The course is aimed at helping accountants to assist their clients in responding to the changes on both strategic and detailed levels.

Who should attend: Accountants already acting for this type of client, who have at least a basic knowledge of the subject, and are looking for a technical update and refresher would benefit most. It will also be suitable for those who would like an understanding of the specific tax problems encountered by the health care sector.

Topics:

- The course will look at the two niches on a compare and contrast basis and will not be 1 ½ hours on Doctors followed by 1 ½ hours on Dentists
- The latest on the Health Professional and the NHS. Before the tax is dealt with, the changing relationship between the GP or the dentist and the NHS must be considered as this often dictates the tax!
 - What structures can be awarded NHS contracts and which cannot!
 - Working at scale, PCNs etc
 - Successions and sales - the rules
 - Superannuation and pensions – where are we?
 - Partnership deeds - the main specialist financial clauses
- Where are we with incorporation, partnerships and other structures after all the changes and their tax implications?
- Specific operational tax problems – IR35, status problems, MTD, VAT, personal expenses and HMRC
- Surgeries - capital gains and capital allowances
- Capital Tax Planning - are you sure they get BPR or ER?
- Stop press - the most recent developments arising out of Budgets, Finance Bills and related developments!

Speaker: Bob Trunchion qualified in the audit department of a big four firm, and soon after moved to their Corporation Tax Department. His move to MacIntyre Hudson in 1985 has rounded off his knowledge so that he is well versed in all aspects of tax. As well as advising clients on a consultancy basis, he is deeply involved in tax training. Bob has appeared on national radio and television talking about IHT. He has a wide range of tax knowledge and lectures on a range of subjects including the tax implications of buying and selling companies, capital taxes planning, trusts and share valuation work. Bob is also a specialist in a number of industries or niches such as farmers and the medical profession.

Live Online				
Date	Weds 20 October			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: OC20A1	

CAPITAL GAINS TAX AND INHERITANCE TAX REFRESHER

Speaker: Bob Trunchion MSc FCA CTA TEP

Objectives: Governments over the years have constantly amended capital taxes with both IHT and CGT each receiving their share of attention in the last few years and it is very likely that the Autumn Budget of 2020 will lead to significant changes in this area. The aim of the course is to update delegates on recent Capital Gains Tax and Inheritance Tax developments as they settle in and as we see how they work in practice including pitfalls and planning opportunities. The course will need to focus on the planning aspects which remain for our clients.

Who should attend: All partners and staff advising clients on tax planning and compliance.

Topics:

- Entrepreneurs' relief – pitfalls and planning
- The importance of "trading company" status
- Interaction with other CGT reliefs
- PPR and other CGT changes around the house!
- Inheritance Tax refresher
- Business & Agricultural Property – 100% relief, are you sure?
- Nil rate band planning – what should we advise?
- What's left for the family home

Speaker: Bob Trunchion qualified in the audit department of a big four firm, and soon after moved to their Corporation Tax Department. His move to MacIntyre Hudson in 1985 has rounded off his knowledge so that he is well versed in all aspects of tax. As well as advising clients on a consultancy basis, he is deeply involved in tax training. Bob has appeared on national radio and television talking about IHT. He has a wide range of tax knowledge and lectures on a range of subjects including the tax implications of buying and selling companies, capital taxes planning, trusts and share valuation work. Bob is also a specialist in a number of industries or niches such as solicitors, farmers and the medical profession.

Live Online				
Date	Tues 14 September			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: SE14B1	

CAPITAL TAXES: FOUR TAX EFFICIENT SCENARIOS AND A DISASTER

Speaker: Amanda Fisher CTA ATT(Fellow) TEP

Objectives: This course has been developed not only to offer an update and a refresher on Capital Taxes but to use five case studies to explore the impact and reality of capital gains tax and inheritance tax implications for our clients.

The case studies will be based on actual client scenarios and the content will cover the tax planning opportunities for our clients in order to minimise their potential tax liabilities.

Who should attend: This course is designed for any delegate who would like a refresher and update on capital tax planning opportunities to ensure they are dealing with their clients' tax affairs in the most tax efficient manner.

Topics:

- Five client-based case studies
- Business Asset Disposal Relief and updates on other CGT reliefs
- Business Relief for Inheritance Tax
- Keeping ownership of property tax efficient
- Keeping our businesses tax efficient

Speaker: Amanda Fisher has her own tax and accountancy practice of private clients, alongside her other freelance work as a lecturer, examiner and author. She also regularly works as a consultant to firms and practitioners on an array of tax matters, specialising in capital taxes, trust and estate matters.

Amanda has devoted time as a committee member for STEP and ICAEW and is currently the Branch Chair for the Thames Valley branch of The Chartered Institute of Taxation.

Southern				
Date	Thurs 11 November			
Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: NO11A1	

CAPITAL TAXES UPDATE

Speaker: Mark Ward LLB CTA

Objectives: During this seminar a number of CGT and IHT planning opportunities available to individuals and trusts will be considered. The session will include an appraisal of the most recent changes in legislation and case law, as well as the protective steps that clients may need to take.

Who should attend: Partners and staff in small and medium sized practices.

Topics: These will reflect recent developments and changes, but are likely to include the following:

CGT business reliefs

- Entrepreneurs' relief
- Gifts of business assets
- Incorporation v disincorporation
- CGT on the sale of a business
- Replacement of business assets
- Incorporation of property businesses

CGT personal reliefs

- Private residences
- Use of trusts

Inheritance tax

- Agricultural and business property reliefs
- Transferable nil rate band
- Will drafting/reviewing
- Deeds of variation
- Use of trusts

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium size firm. He has been lecturing on a wide variety of tax matters for over 25 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

South East				
Date	Tuesday 12 October			
Venue	Crown Plaza Felbridge			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: OC12A1		

Southern				
Date	Tuesday 11 May			
Venue	Solent Hotel, Whitely, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee		Code: MY11B1		

Thames				
Date	Monday 15 March			
Venue	Coppid Beech Hotel, Binfield, Bracknell			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee		Code: MA15B1		

TRUSTS: FOUR TAX EFFICIENT CASE STUDIES AND A DISASTER

Speaker: Amanda Fisher CTA ATT (Fellow) TEP

Objectives: This course has been developed not only to offer an update and a refresher for Trusts but to use five case studies to explore the use and reality of trusts for our clients.

The case studies will be based on actual client scenarios and the content will cover the creation of the trusts, the tax efficiency of the trusts and the management of the trusts and how to keep them tax efficient and relevant to the client needs.

Who should attend: General practitioners who already have trusts clients and would like to be more proactive in advising them on the tax efficient management of existing trusts. The course will also benefit practitioners who would like to increase their opportunities for advising clients on how to minimise their current and potential liabilities by using trusts.

Topics:

- Five client-based trust case studies
- The use and the relevance of the trusts
- The tax implications of creating the trusts
- Managing the trusts and minimising income tax, capital gains tax and inheritance tax
- Planning when to make income and capital distributions
- The formalities of ending a trust

Speaker: Amanda Fisher has her own tax and accountancy practice of private clients, alongside her other freelance work as a lecturer and author. She also regularly works as a consultant to firms and practitioners on an array of tax matters, specialising in capital taxes, trust and estate matters.

Amanda has devoted time as a committee member for STEP and ICAEW and is currently the Branch Chair for the Thames Valley branch of The Chartered Institute of Taxation.

Live Online					Southern				
Date	Thursday 11 March				Date	Weds 13 October			
Venue	Live online using Zoom				Venue	Solent Hotel, Whiteley, Fareham			
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee				Code: MA11A1	Course fee: £110+VAT See p4 for Flexi fee				Code: OC13A1

COMPLETE GUIDE TO ACTING FOR SMALL BUSINESSES

Speaker: Martyn Ingles BSc FCA CTA

Objectives: This course aims to cover the practicalities of dealing with sole traders, CIS contractors and personal service companies in 2021 and will consider the lifecycle of the business from start up to sale. Planning issues will be discussed and supplemented by practical examples.

Who should attend: Anyone providing advice to sole traders, CIS contractors and personal service companies.

Topics:

- Employment status – am I really self-employed?
- CIS problem areas
- Tax planning in the opening years
- VAT issues for small businesses
- IR35 and personal service company considerations
- Extension of the “off -payroll” working rules to the private sector
- Bringing in the spouse
- CGT on the sale of the business

Topical issues may be added nearer the time.

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MHA MacIntyre Hudson. He is now a Consultant with MacIntyre Hudson Advisory Services LLP. Martyn’s main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

Live Online					South East				
Date	Wednesday 7 July				Date	Tuesday 27 April			
Venue	Live online using Zoom				Venue	Mercure Maidstone Great Danes Hotel			
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: JY07A1			Course fee: £110+VAT See p4 for Flexi fee		Code: AP27A1		

CONSTRUCTION INDUSTRY TAX REFRESHER

Speaker: Tim Palmer CTA ATT

Objectives: The aim of this course is to give delegates a detailed understanding of the current CIS tax rules and administration requirements. The full practical impact of tax and CIS will be considered.

Who should attend: All accountants in practice and industry and other professional advisers who are involved in the taxation aspects of the construction industry, particularly in tax dealings with contractors and subcontractors.

Topics:

- The CIS tax responsibilities of both the contractor and subcontractor under the current CIS regime
- The 2021 changes to the construction industry tax regime
- Verification and the steps contractors have to take
- The dealings the contractor will have with HMRC
- The monthly CIS return: its completion and filing
- The CIS tax impact on the subcontractor
- How to reclaim CIS deductions under the new regime
- Is the subcontractor really self-employed?
- Current problems facing contractors and subcontractors
- What really are construction operations
- Who are within the scheme and who are not
- Case studies
- The new CIS VAT domestic reverse charge
- The interaction of IR35 with the construction industry
- VAT areas relating to construction
- Practical CIS planning
- General overview

Speaker: Tim Palmer CTA ATT, is one of the UK's best known and popular tax presenters. He lectures frequently all over the UK on a wide variety of taxation subjects. He has been presenting such tax lectures for over 25 years.

Previously, Tim was a senior Tax Manager with Howarth Clark Whitehill LLP, advising on all areas of tax and NIC for the firm to their clients. He was also a member of the tax department of P&O where he specialised in Corporation Tax and the Construction Industry, being involved in the Bovis Construction Industry tax deduction scheme within the P&O Group. Additionally, Tim has written numerous articles in the Tax Press particularly with regard to his specialist areas of CIS, 'self-employed status issues', NIC and PAYE matters, IHT and Corporation Tax. Tim is currently the Senior Partner of Palmer Consultancy Partnership.

South East					Southern				
Date	Weds 8 December				Date	Tuesday 8 June			
Venue	Mercure Maidstone, Great Danes Hotel				Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: DE08B1		Course fee: £110+VAT See p4 for Flexi fee			Code: JN08B1	

DEALING WITH COMMON PROPERTY TRANSACTIONS

Speaker: Dean Wootten FCA CTA

Objectives: The course will cover areas that practitioners encounter when dealing with clients with residential and commercial property interests.

Who should attend: The course is aimed at partners, managers and seniors who come across property related issues in their daily work.

Topics:

- Problem areas in the rental computation
- When to claim relief on furnishings
- Joint tenants or tenants in common?
- Allocating rental profits between property owners
- When to use declarations of trust and Form 17
- Common issues for clients letting student houses
- Furnished holiday lets
- VAT issues for developers letting rather than selling
- Issues with the VAT domestic reverse charge in the construction industry
- Principal private residence relief
- CGT reporting
- Use of family trust for gifts of property
- IHT planning with residential buy to let portfolios
- SDLT issues when dealing with residential and commercial property

Speaker: Dean Wootten has been involved in tax training for many years and lectures and consults on a wide variety of tax matters. Dean started his career as a Chartered Accountant, qualifying with Grant Thornton in 1988. Dean then spent two years overseas with KPMG before returning to a medium sized provincial firm in Sussex. Shortly after returning to the UK, Dean qualified as an Associate of the Institute of Taxation in 1991. Whilst in practice Dean gained valuable experience including five years at partner level. The experience gained enables Dean to focus his lecturing on the practical aspects of the issues presented.

Live Online				
Date	Weds 3 November			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: NO03A1	

Southern				
Date	Tuesday 29 June			
Venue	Solent Hotel, Whiteley, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: JN29A1	

VAT ESSENTIALS

Speaker: Dean Wootten FCA CTA

Objectives: The course will cover VAT areas that practitioners and their staff encounter when dealing with owner managed clients.

Who should attend: The course is aimed at partners, managers and accounting staff who deal with owner managed clients in their daily work.

Topics:

- Registration issues – UK and overseas
- Common output tax liability errors
- Input tax recovery on directors, staff and freelancers costs
- Business entertainment and subsistence issues
- Impact of private use
- Business gifts – when we can and cannot recover VAT
- Dealing with sales commission
- Understanding transactions involving agents
- Common problems with the CIS domestic reverse charge
- VAT issues when refurbishing or converting properties
- Minimising VAT penalties
- Extension of MTD to all VAT registered businesses

Speaker: Dean Wootten has been involved in tax training for many years and lectures and consults on a wide variety of tax matters. Dean started his career as a Chartered Accountant, qualifying with Grant Thornton in 1988. Dean then spent two years overseas with KPMG before returning to a medium sized provincial firm in Sussex. Shortly after returning to the UK, Dean qualified as an Associate of the Institute of Taxation in 1991. Whilst in practice Dean gained valuable experience including five years at partner level. The experience gained enables Dean to focus his lecturing on the practical aspects of the issues presented.

South East					Southern				
Date	Weds 10 November				Date	Tues 28 September			
Venue	Crowne Plaza Hotel, Crawley				Venue	Solent Hotel Whiteley, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee				Code: NO10A1	Course fee: £110+VAT See p4 for Flexi fee				Code: SE28A1

HOT TOPICS IN VAT

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course provides an update on important changes in VAT in the twelve months preceding the course. It will review recent cases and identify potential problem areas for clients. The course will explain in detail important or complex cases (including tribunal decisions) thus providing a better understanding of complex areas of VAT law.

Who should attend: All practitioners who advise on VAT as well as accountants in business responsible for VAT.

Topics: The specific course content will depend on changes in the period before the course is run, but in general the course will follow the same structure covering:

- Any relevant Budget and Finance Act changes
- Identification of particular trends in cases or in the approach of HMRC
- Major VAT cases in the preceding twelve months: what the case established; likely impact on clients generally
- Consequences of Brexit
- Topical tips and traps
- Important developments likely to occur in the succeeding months

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Live Online				
Date	Weds 22 September			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: SE22A1		

South East				
Date	Wednesday 12 May			
Venue	Mercure Maidstone, Great Danes Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee		Code: MY12B1		

Southern				
Date	Weds 24 February			
Venue	Solent Hotel, Whiteley, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee		Code: FE24B1		

COMPLETE GUIDE TO INTERNATIONAL VAT ISSUES

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

A one-day seminar including a light lunch. It may be attended on the Flexiticket using **2 places** or for a single fee of £185+VAT

Objectives: This course aims to provide participants with a thorough knowledge of the VAT provisions relating to international transactions, in both goods and services, and the problems often encountered in this area. It will also cover the implications of selling goods and services online. By attending this course you will gain:

- A clear understanding of the way the rules work and how they are changing
- Greater confidence to advise clients undertaking international transactions
- An appreciation of some of the many pitfalls in this area and how to avoid them

Who should attend: All accountants involved in or advising on international transactions in goods and/or services.

Topics:

- The implications of Brexit
- Imports and exports
- Evidential requirements
- Supplying services to overseas customers
- When to charge VAT and when not to charge VAT
- Invoicing requirements
- Postponed accounting for import VAT
- Services bought from overseas suppliers
- The reverse charge
- Overseas VAT recovery
- Overseas registration issues
- EORI numbers
- Duty deferment
- Selling to EU consumers

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

South East				
Date	Tuesday 19 October			
Venue	Denbies Wine Estate, Dorking			
Time	Reg'n	Course starts	Lunch	Course ends
	09:00	09:30	12:30 13:30	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: OC19D1	

Southern				
Date	Wednesday 24 March			
Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Lunch	Course ends
	09:00	09:30	12:30 13:30	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MA24D1	

COMPLETE GUIDE TO ESSENTIAL VAT FOR CHARITIES

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: Ironically, charities have one of the most complicated VAT regimes of any business sector, meaning it is imperative that their finance teams and those advising them have a proper appreciation of the relevant VAT provisions. This course will review these provisions and their applications in depth, including some of the more problematic areas. By attending this course, you will gain:

- A thorough understanding of the VAT regime as it relates to the charitable sector
- A better awareness of those areas likely to cause the most problems and how best to deal with them
- A recognition of how to make the best of the complex VAT rules in this area

Who should attend: Anyone involved in auditing or advising charity sector clients. Finance directors and managers of charities requiring knowledge of the VAT regime applicable to their organisation.

Topics:

- Sponsorship
- Advertising
- Grants and donations
- Business/non-business
- Supplies to charities – standard rated, zero-rated and exempt supplies
- Supplies by charities – zero-rating and exemption
- Recovery of input by charities – problem areas

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Live Online				
Date	Thursday 27 May			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MY27A1	

COMPLETE GUIDE TO VAT AND PROPERTY TRANSACTIONS

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course aims to provide participants with a thorough knowledge of the most topical aspects of this most complex area of VAT. It covers provisions relating to property developers and others owning an interest in property. By attending this course, you will gain:

- A clear understanding of the way the rules work and why
- Greater confidence to advise clients undertaking property transactions
- An appreciation of pitfalls in this area and how to avoid them

Who should attend: All accountants and other business advisers who have clients involved in land transactions or property developments.

Topics:

- Sale and letting of new residential property
- Selling and leasing new property to charities
- Non-exempt property transactions
- The option to tax in detail
- Sale and purchase of let property
- The DIY Housebuilders and Converters Scheme

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

South East					Southern				
Date	Tuesday 20 April				Date	Wednesday 5 May			
Venue	Crowne Plaza Hotel, Crawley				Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: AP20A1			Course fee: £110+VAT See p4 for Flexi fee		Code: MY05A1		

COMPLETE GUIDE TO VAT IN THE CONSTRUCTION INDUSTRY

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course aims to provide participants with a thorough knowledge of the most topical aspects of this business sector. It covers the principal provisions relating to building contractors and other working in the construction industry. By attending this course, you will gain:

- A clear understanding of the way the rules work and why
- Greater confidence to advise clients providing or receiving construction services
- An appreciation of pitfalls in this area and how to avoid them

Who should attend: All accountants and other business advisers who have clients involved in the building sector including undertaking property projects.

Topics:

- Zero-rated new construction work in detail
- Reduced-rated building conversions in detail
- The exclusions from zero-rating and reduced-rating
- Work for charities and housing associations
- The problems with wrongly charged VAT
- The construction sector reverse charge

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

South East					Southern				
Date	Thurs 25 February				Date	Wednesday 17 March			
Venue	Denbies Wine Estate, Dorking				Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: FE25A1		Course fee: £110+VAT See p4 for Flexi fee			Code: MA17A1	

TOPICAL TAX TIPS AND PITFALLS

Speaker: Rebecca Benneyworth MBE BSc FCA

Objectives: This course will include a range of topical tax issues not covered elsewhere in the two and a half day SCSA Tax Conference at the University of Kent. It is offered as a stand-alone course at the Conference. The sessions take place on the final day of the Conference. If you prefer to attend the whole conference please see page 75. This course may be attended using one Flexiticket place or can be purchased on an individual course basis (see page 4 for fees). Please note the course starts at the slightly earlier time of 09:15.

Who should attend: General practitioners with small and medium sized clients.

Topics: The topics covered will be set nearer the conference date. Rebecca will work closely with the other speakers to make sure that there is no significant overlap in content, although Rebecca's very practical slant on some topics covered on some topics covered on the conference may be useful to attendees. Possible topics include:

- Off payroll working – how is it going?
- Making Tax Digital – prepare for take-off!
- Easing small clients into digital record keeping
- Cars – electric and otherwise
- Advice about incorporation or disincorporation for small businesses
- Extracting funds from your small limited company
- What else is new on the tax front?

Speaker: Rebecca Benneyworth is well known on the lecture circuit for her practical and down to earth approach to tax issues. She is a past Chair of the ICAEW Tax Faculty and currently sits on the board of the Faculty. She currently lectures for a wide range of organisations, mainly to accountant audiences, but has also presented sessions for HMRC and HM Treasury on a number of occasions. She sits on the Administrative Burdens Advisory Board which advises HMRC on tax compliance burdens on businesses, and is Chair of the Digital Advisory Board which advises HMRC on the impact of Making Tax Digital on small firms and their clients. She has a small digital accountancy practice in Gloucestershire.

South East				
Date	Friday 25 June			
Venue	University of Kent, Canterbury			
Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:15	10:45	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: JN25A1	

ACCOUNTING AND AUDIT COURSES PROGRAMME

See also 'Specialist' section (pages 55-70) for specialist audit and accounting topics

Course	Speaker	Online/District				B/P	Page
		Online	SE	SO	TV		
* Audit and Accounting Update: Spring and Autumn	G.Loveday	●	●	●	●	P	40
* Accounting and Financial Reporting Update: Spring and Autumn	G.Loveday	●	●	●		P	41
* Accounting Update for Accountants in Business: Spring and Autumn	G.Loveday	●	●	●	●	B	42
A Practical Accounting Update for Returners	K.McCaffrey	●				P	43
Annual IFRS Update	G.Loveday	●				B/P	44
Anti-Money Laundering and Fraud Refresher and Update	P.Herbert		●	●		P	45
Practical Problems in UK GAAP	P.Herbert		●	●		B/P	46
Accounting for and Auditing Academy Schools Update	P.Herbert	●				P	47
SRA Accounts Rules Update: The 'New' Rules and the Accountant's Report	J.Taylor	●				P	48
Topical Audit Problems and Solutions	J.Selwood	●				P	49
Introduction to Charity Accounts	B.Telford	●				P	50
Introduction to Pension Scheme Accounts	B.Telford	●				P	51
Pensions Accounting, Audit and Regulatory Update	P.Herbert	●				P	52
Introduction to Housing Association Accounts and Audit	P.Herbert	●				P	53
Housing Associations Accounting and Audit Update	P.Herbert	●				P	54

KEY: B = interest to business P = interest to practice

* early booking on these courses is strongly recommended as they are invariably oversubscribed

HALF YEARLY AUDIT AND ACCOUNTING UPDATES

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: These courses aim to provide busy practitioners and their staff with a practical and intensive review of developments over the last six months as well as changes likely to occur in the near future. Whilst the summer and winter courses are stand alone updates, maximum benefit is gained by attending both. Please note there are also accounting and financial reporting updates (for those who do not require audit) also presented by Guy Loveday on Monday 17 May and Tuesday 30 November live online using Zoom, on Wednesday 9 June and Monday 29 November at Maidstone, Friday 7 May at Felbridge, and Thursday 10 June and Wednesday 1 December at Botley Park (see page 41).

Who should attend: Partners in small and medium sized practices and their professional staff.

Topics: In order to ensure up to the minute coverage the detailed programme will be set nearer the time. Topics are likely to include:

- Developments in FRS 105 and FRS 102 including Section 1A for small entities
- Relevant changes in company legislation
- The increased focus on realised and distributable profits
- Other technical, regulatory and professional developments
- Developments in Auditing Standards – particularly the radical overhaul of ISA 315 on the risks of material misstatement
- Important Audit Monitoring points

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing

Set out below are the dates and venues and timing for all the updates. **Early booking on these courses is strongly recommended.** The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Registration: 09:00	Course starts: 09:30	Coffee: 11:00	Course ends: 12:30
PM	Registration: 13:00	Course starts: 13:30	Coffee: 15:00	Course ends: 16:30

South East			
Wednesday 9 June	PM	Mercure Maidstone Great Danes Hotel	Code: JN09B1
Tuesday 23 November	AM	Crowne Plaza Felbridge	Code: NO23A1
Monday 29 November	PM	Mercure Maidstone Great Danes Hotel	Code: NO29B1
Southern			
Thursday 10 June	PM	Botley Park Hotel, Botley	Code: JN10B1
Wednesday 1 December	PM	Botley Park Hotel, Botley	Code: DE01B1
Thursday 9 December	AM	Village Hotel, Bournemouth	Code: DE09A1
Thames			
Monday 24 May	AM	Sindlesham Court, Wokingham	Code: MY24A1
Wednesday 17 November	PM	Sindlesham Court, Wokingham	Code: NO17B1
Live Online			
Monday 17 May	PM	Live online using Zoom	Code: MY17B1
Tuesday 30 November	PM	Live online using Zoom	Code: NO30B1

ACCOUNTING AND FINANCIAL REPORTING UPDATE

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: We provide this course for delegates who are looking for a technical update but do not require the auditing content. A half yearly taxation update is held on the same day (see page 7). The course provides a practical and intensive review of developments in accounting and financial reporting over the last six months as well as changes likely to occur in the near future.

Who should attend: Partners in small and medium sized practices and their professional staff.

Topics: In order to ensure up to date coverage, the detailed programme will be set nearer the time. Topics are likely to include:

- Changes to FRS 105 and FRS 102, including Section 1A for small companies
- Practical implications of accounting changes
- Other topical issues affecting small and micro entity accounts
- Company legislation including the current focus on realised and distributable profits
- ICAEW technical releases
- FRC staff fact sheets
- Other general areas of interest

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing

Set out below are the dates, venues and timing for these courses. **Early booking on these courses is strongly recommended.** The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Registration: 09:00	Course starts: 09:30	Coffee: 11:00	Course ends: 12:30
South East				
Friday 7 May	Crowne Plaza Felbridge			Code: MY07A1
Wednesday 9 June	Mercure Maidstone Great Danes Hotel			Code: JN09C1
Monday 29 November	Mercure Maidstone Great Danes Hotel			Code: NO29C1
Southern				
Thursday 10 June	Botley Park Hotel, Boorley Green, Botley			Code: JN10C1
Weds 1 December	Botley Park Hotel, Boorley Green, Botley			Code: DE01C1
Live Online				
Monday 17 May	Live online using Zoom			Code: MY17C1
Tuesday 30November	Live online using Zoom			Code: NO30C1

HALF YEARLY ACCOUNTING UPDATES FOR ACCOUNTANTS IN BUSINESS

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: All Chartered Accountants are required to undertake CPD. This course is specifically designed to meet the CPD needs of accountants working in business. The course will provide delegates with an update on accounting issues relevant to accountants working in industry and commerce. Comprehensive notes are provided which facilitate future reference. The courses are run half yearly and maximum benefit is obtained by attending both.

Who should attend: Those working in industry and commerce who need to keep abreast of accounting developments.

Topics: Specific course content will be finalised shortly before each course date, but topics will most likely include:

- The latest thoughts and interpretations on working with FRS 101 and FRS 102
- Financial Reporting Review Panel – latest comments on strategic reports, press notices, IFRS and UK GAAP compliance and topical accounting issues
- Progress towards the replacement of the FRC
- Case studies on current issues
- Relevant technical releases from professional bodies
- Relevant developments on the future of audit as they impact upon companies

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing: Set out below are the dates and venues for all the updates. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees). The accounting update courses are run in the morning. In the afternoon there is a similar taxation update (see page 8 for details). The timing for all courses is as follows:

Registration: 09:00	Course starts: 09:30	Coffee: 11:00	Course ends: 12:30
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South East		
Friday 21 May	Denbies Wine Estate, Dorking	Code: MY21A1
Tuesday 15 June	Mercure Maidstone Great Danes Hotel	Code: JN15A1
Friday 19 November	Denbies Wine Estate, Dorking	Code: NO19A1
Monday 22 November	Mercure Maidstone Great Danes Hotel	Code: NO22A1
Southern		
Wednesday 16 June	Botley Park Hotel, Boorley Green, Botley	Code: JN16A1
Wednesday 24 November	Botley Park Hotel, Boorley Green, Botley	Code: NO24A1
Thames		
Thursday 17 June	Sindlesham Court, Wokingham	Code: JN17A1
Thursday 18 November	Sindlesham Court, Wokingham	Code: NO18A1
Live Online		
Tuesday 20 April	Live online using Zoom	Code: AP20C1
Tuesday 16 November	Live online using Zoom	Code: NO16A1

A PRACTICAL ACCOUNTING UPDATE FOR RETURNERS

Speaker: Kate McCaffrey BSc FCA

Objectives: This annual course complements the practical tax ‘brush-up’ course (see page 9), providing an update for returners to the profession on audit and accounting topics. The basic principles of the topics will be covered, most of which will already have been learnt and understood by delegates, but which may not have been used for some time. The course will cover the more practical aspects of each subject area.

Who should attend: Returners to the professional workplace, who are qualified accountants that would like to “brush” up their knowledge and understand the changes that have taken place.

Topics:

- UK Accounting Standards Developments
- International Accounting Standards Developments
- Key Auditing Developments
- Corporate Governance
- Ethics
- Company Law update
- Relevant Legislation updates
- Current topics on the horizon

Speaker: Kate McCaffrey works in the Technical Services Group at BDO. She has a wide range of knowledge of auditing and accountancy across several industry sectors. Post qualification, Kate worked as a financial controller in industry. Kate combines working on a client portfolio with the responsibility of advising clients and staff on technical issues and pronouncements. She also presents practical and technical courses to staff, clients, membership organisations and professional bodies. Her knowledge and experience ensures that the training provided is specific and relevant to the audience.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

* Please note: concessions on the standard fee for this course and the taxation technical ‘brush-up’ (see page 9) are available for delegates not currently in work. For details phone 01737 223999.

Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
Live Online			
Thursday 20 May	Live online using Zoom	CODE: MY20B1	
Thursday 23 September	Live online using Zoom	CODE: SE23B1	

ANNUAL IFRS UPDATE

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: This course will focus on the areas where UK companies and their auditors are being criticised for their failure to comply with IFRS. It will look at the ongoing impact of newly effective standards and changes in the pipeline.

Who should attend:

- Accountants responsible for preparing accounts under IFRS
- Accountants responsible for auditing accounts prepared under IFRS
- Accountants needing to convert from UK GAAP to IFRS

Topics: The course will cover:

- Application of IFRS 16 on leases
- Latest Review Panel Annual Report concerning application of IFRS by UK companies
- Latest FRC Thematic Reviews
- Latest IASB developments

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
Live Online			
Wednesday 21 April	Live online using Zoom	Code: AP21C1	
Tuesday 14 September	Live online using Zoom	Code: SE14A1	

ANTI-MONEY LAUNDERING AND FRAUD REFRESHER AND UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: Although the 2017 Money Laundering Regulations are well established now, they create a raft of practical problems for firms. This course will provide an insight into common issues that firms face when applying the regulations and how they should tackle these under the SARs regime.

Who should attend: Partners, managers and staff in accounting firms who want an update and refresher on AML compliance.

Topics:

- The 2017 Money Laundering Regulations – what they are and how they affect practitioners
- 2020 updates to the regulations
- ‘Risk management practices’ – what they are and what firms need to do to comply
- Different types of fraud that affect accountants and their clients and how to spot them
- Reporting money laundering offences to the NCA – key do’s and don’ts
- Update on cybercrime and GDPR – what it is and what it means for firms and their clients in practice
- AML regulation - the future direction of travel

Speaker: Peter Herbert qualified as a Chartered Accountant with an international accountancy firm before working in industry. He has over 15 years of training experience, specialising in financial reporting, auditing, company law and practice regulation. Peter also has a small accounting practice. Much of Peter’s practice work involves carrying out audit file reviews, practice assurance and anti-money laundering reviews for firms of accountants. He also provides guidance on implementation of GAAP.

South East					Southern				
Date	Thurs 25 February				Date	Tuesday 8 June			
Venue	Denbies Wine Estate, Dorking				Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: FE25B1		Course fee: £110+VAT See p4 for Flexi fee			Code: JN08A1	

PRACTICAL PROBLEMS IN UK GAAP

Speaker: Peter Herbert BSc FCA

Objectives: Although new UK GAAP is now well established, it still creates a range of problems in relation to accounting and disclosure. This course will highlight a range of such problems and provide practical advice on how to resolve them.

Who should attend: General practitioners and accountants in industry who prepare financial statements using FRS 102 and FRS 105.

Topics:

- Eligibility criteria and how to apply them in practice
- Making the case for FRS 105
- Accounting for fixed assets and investment properties
- Financial instruments – common accounting issues for SMEs
- Identifying and correcting errors in financial statements
- Accounting for current and deferred tax
- What is and isn't allowed when making provisions
- Revenue recognition
- Common disclosure issues when applying FRS 102 section 1A
- Preparing filleted and abridged accounts
- Where next – the future direction of travel

Speaker: Peter Herbert qualified as a Chartered Accountant with an international accountancy firm before working in industry. He has over 15 years of training experience, specialising in financial reporting, auditing, company law and practice regulation. Peter also has a small accounting practice. Much of Peter's practice work involves carrying out audit file reviews, practice assurance and anti-money laundering reviews for firms of accountants. He also provides guidance on implementation of GAAP.

South East					Southern				
Date	Tuesday 20 April				Date	Wednesday 5 May			
Venue	Crowne Plaza Crawley				Venue	Basingstoke Country Hotel			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: AP20B1		Course fee: £110+VAT See p4 for Flexi fee			Code: MY05B1	

ACCOUNTING FOR AND AUDITING ACADEMY SCHOOLS UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: This seminar will act as a refresher and an update on producing and auditing financial statements for Academy Schools. The latest Academies Accounts Direction and Financial Handbook will be explored in depth.

Who should attend: General practitioners who prepare and audit financial statements for Academy Schools and finance officers working within the sector.

Topics: Topical financial reporting issues will be covered in detail, with real Academy financial statements used throughout as a point of reference. The audit part of the session will focus on balancing efficiency and effectiveness when conducting the true and fair and regularity audits required by the ESFA. Specific topics covered will be:

- The latest Academies Accounting Direction - key changes and their impact
- Subjective areas of accounting for Academies – and how to get them right
- 2021 Updates on the Academies Financial Handbook
- ESFA feedback for Academies and their auditors – examples of good and poor practice
- Academy accounts 'hot topics' – what they are and how to address them

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Live Online				
Date	Tuesday 6 July			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: JY06A1	

SRA ACCOUNTS RULES UPDATE: THE 'NEW' RULES AND THE ACCOUNTANT'S REPORT

Speaker: Janet Taylor FCA

Objectives: To provide delegates with a detailed update on the Accounts Rules and the very latest guidance from the both the SRA and the ICAEW.

The 'new' rules will have been in place for over a year and guidance has continued to evolve over that time - keeping up to date is no mean feat!

Who should attend: All partners and staff who have a reasonable knowledge of the rules and need to be confident they are fully up to date, recognise the problem areas for firms under the principles based rules as well as the key risk areas for the reporting accountant.

Topics: The session will cover:

- The rules themselves including:
 - Key definitions
 - Dealing with receipts and payments and transferring money for the firm's charges
 - 'Opting out' - the use of Third Party Managed Accounts
 - Potential problem areas
 - All the guidance from the SRA
- How the Reporting Accountant's role has and will continue to develop, including:
 - Terms of engagement and SRA expectations
 - Impact of other areas of the SRA handbook on the accountant's work
 - The most up to date guidance from the ICAEW and the SRA regarding
 - Risk areas
 - Serious breaches/reportable issues
 - Feedback on the latest reports

Speaker: Janet Taylor, owner Taylor Mowbray LLP, spent over 10 years with a top 20 accounting firm heading up their specialist solicitors' group. A highly experienced presenter, Janet provides relevant and practical training on a number of financial issues for lawyers. She is also a regular presenter of Solicitors' Accounts Rules training to a wide range of accounting and law firms through in-house and public seminars. Clients have included several major international and national law firms as well as reporting accountants. Janet is the subject matter expert for the ICAEW's Solicitors Community Advisory Group.

Live Online				
Date	Tuesday 23 March			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MA23A1	

TOPICAL AUDIT PROBLEMS AND SOLUTIONS

Speaker: John Selwood FCA

Objectives: This course will look at real life problems that auditors have recently experienced and examine practical and efficient solutions.

Who should attend: All accountants involved in audit.

Topics: The course will cover the following topical problem areas:

- The new FRC Ethical Standard especially considerations involving long association, provision of non-audit services, gifts and hospitality and fees
- Audit issues arising from accounting estimates, like impairment, provisions, dilapidations and useful economic lives
- Difficult audit reports
- Auditing going concern
- Addressing the risk of fraud
- Laws and regulation – practical help
- How much needs to be done on journals
- Getting materiality right
- Relying upon experts and dealing with service organisations
- Auditing pension scheme obligations

Speaker: John Selwood is a Chartered Accountant and independent training consultant, who lectures for major accountancy practices, professional bodies, training companies and publishers. He speaks on financial reporting, auditing, anti-money laundering and company law. Previously, he has been the technical partner for a top thirty firm of accountants and head of an accountancy network.

John is a member of ICAEWs Audit and Assurance Faculty's Practitioner Services Panel and has been involved with presenting and writing the material for the Audit & Assurance and Financial Reporting Faculty's Roadshows for a number of years. He also regularly writes for Audit & Beyond and is the author of Core Auditing Standards for Practitioners.

Live Online				
Date	Monday 18 October			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: OC18B1	

INTRODUCTION TO CHARITY ACCOUNTS

Speaker: Bill Telford BA FCA

Objectives: Charities are everywhere and are staple clients of many firms of accountants. There are nearly 170,000 separate charities registered with the Charity Commission in England and Wales with a further 18,000 linked charities.

This course will review the regulatory regime in which charities operate and provide the fundamentals needed for the preparation and scrutiny of charity accounts.

Who should attend: Partners and staff with little or no experience in charity reporting and those requiring a refresher of charity accounts fundamentals. The course will also benefit new charity treasurers and trustees.

Topics:

- Charities, charitable objectives and public benefit and the impact on the accounts
- What accounts are required and when do they need external scrutiny
- Charity funds and fund accounting
- Practical issues in the preparation of charity accounts
- The charity audit and report - an overview
- Independent examination – understanding the work and report
- Reporting to charity regulators

Speaker: Bill Telford has spent more than 30 years in technical and training roles within the profession. He joined Baker Tilly as National Training Director in July 2000 and became a partner in March 2007. In September 2010 he became a freelance lecturer and training consultant whilst remaining a consultant with Baker Tilly. He is well known as an entertaining and authoritative lecturer, able to make auditing and financial reporting both practical and interesting, and relevant to the small and medium sized firm.

Live Online				
Date	Wednesday 10 March			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MA10A1	

INTRODUCTION TO PENSION SCHEME ACCOUNTS

Speaker: Bill Telford BA FCA

Objectives: The audit of pension schemes is one of the specialist areas which many firms are involved in and which is of special interest to the regulators. Many of the issues in pension scheme accounts are unique and not covered in more general accounting and auditing training.

This course will review the regulatory regime in which pension schemes operate and provide an understanding of the fundamentals needed for the preparation and audit of pension scheme accounts.

Who should attend: Partners and staff with little or no experience in pension scheme accounts and those requiring a refresher of pension scheme accounts fundamentals.

Topics:

- The pension scheme and how it works
- The types of pension scheme – defined benefit or money purchase and the impact on the accounts
- Understanding the accounting and reporting requirements
- Understanding how to account for the transactions in the scheme
- Accounting for assets and liabilities
- Practical issues in audit and reporting
- Reporting to The Pensions Regulator

Speaker: Bill Telford has spent more than 30 years in technical and training roles within the profession. He joined Baker Tilly as National Training Director in July 2000 and became a partner in March 2007. In September 2010 he became a freelance lecturer and training consultant whilst remaining a consultant with Baker Tilly. He is well known as an entertaining and authoritative lecturer, able to make auditing and financial reporting both practical and interesting, and relevant to the small and medium sized firm.

Live Online				
Date	Tuesday 16 March			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MA16A1	

PENSIONS ACCOUNTING, AUDIT AND REGULATORY UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: The pension scheme SORP continues to present challenges for accountants and auditors. This update will address all the common accounting and disclosure problem areas and how they should be tackled in practice.

The seminar will also reflect on the challenges faced by firms when auditing pension schemes and how they can successfully comply with the Clarity ISAs, whilst still maximising audit efficiency. In addition, we will update delegates on all recent regulatory changes and important pronouncements from the Pensions Regulator and the Pensions Research Accountants Group (PRAG).

Who should attend: Partners, managers and staff in accounting firms who prepare and audit pension scheme financial statements.

Topics:

- Which pension schemes do and don't need audited accounts
- The Pensions SORP – key changes and how these have been addressed
- Drafting disclosure notes – what good looks like for smaller pension schemes
- Effective but efficient auditing of pension schemes
- Reliance on service organisations when auditing pension schemes – key tips and traps
- Reporting on contributions – what goes wrong and when to qualify the audit report
- SORP and Audit Practice note revisions in the pipeline
- The Pensions Regulator – recent Codes of Practice and other topical issues

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Live Online				
Date	Thursday 21 October			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: OC21A1	

INTRODUCTION TO HOUSING ASSOCIATION ACCOUNTS AND AUDIT

Speaker: Peter Herbert BSc FCA

Objectives: Preparing and auditing housing association accounts can be challenging for those who are new to the sector. This seminar will provide a broad based introduction to the format of the accounts and the underpinning regulations along with a detailed insight into the tests that should be performed when auditing housing associations.

Who should attend: Accountants and other financial professionals new to Housing Associations who are or will be involved in statutory and management reporting and auditing in the sector.

Topics:

- The rules that underpin housing association financial statements and audit
- The format of the accounts and detailed disclosure requirements
- Narrative reporting
- How 'normal' accounting rules differ for housing associations
- How to plan, perform and complete a housing association audit

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Live Online				
Date	Tuesday 30 March			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MA30A1	

HOUSING ASSOCIATIONS ACCOUNTING AND AUDIT UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: FRS 102 and the Social Housing SORP have been used by Registered Social Landlords across the UK since accounting periods beginning on or after 1 January 2015. This seminar will provide an update on practical challenges and emerging issues relevant to those working in or advising companies in the sector.

Who should attend: Accountants and other financial professionals within Housing Associations involved in statutory and management reporting and external accountants and auditors who act for clients in the Housing sector.

Topics:

- New accounting and disclosure developments relevant to housing associations
- Tricky accounting areas – and how to get them right
- Accounting and auditing challenges in housing groups and how to tackle them
- Other relevant regulatory changes – including recent changes from the Regulator of Social Housing - how these will impact on financial reports
- A file reviewer's perspective of common problems encountered when auditing housing associations

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Live Online				
Date	Wednesday 19 May			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MY19A1	

SPECIALIST COURSES PROGRAMME

Course	Speaker	Online/District				B/P	Page
		Online	SE	SO	TV		
Employment and Business Law Update	L.Dunford		●	●		B/P	56
Charities Update	J.Poulter	●	●	●		B/P	57
Charities Legal Update	L.Dunford		●	●		B/P	58
Complete Guide to Valuation of Unquoted Company Shares and Businesses	J.Nelder	●	●			B/P	59
Moving into Advisory Services	M.Lee	●				P	60
Businesses in Trouble: Helping Your Clients in a Time of Crisis	C.Djanogly	●				B/P	61
Insolvency Proceedings: What Your Clients Need to Know	C.Djanogly			●		B/P	62
Improving Your Personal Effectiveness	P.Thatcher			●		B/P	63
Communicating with Impact	P.Thatcher		●			B/P	64
Cyber Security and GDPR Update	S.Hill	●		●		B/P	65
Why Power Query is the Most Important Excel Development Ever – Even if You Don't Work with Data!	S.Hurst	●				B/P	66
Good Spreadsheet Practice: Excel Fundamentals	S.Hurst	●				B/P	67
Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	●				B/P	68
50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	●				B/P	69
More Power to your Pivot: Practical Uses for Excel Pivot Tables	S.Hurst	●				B/P	70

KEY: B = interest to business P = interest to practice

EMPLOYMENT AND BUSINESS LAW UPDATE

Speaker: Louise Dunford LLM LLB Barrister

Objectives: The course provides a good overview of a number of areas of law, concentrating on the topics likely to be most useful to you in your day to day dealings with clients and staff. Given the current state of uncertainty surrounding the pandemic, which is ongoing at the time of writing and the outcome of the EU exit negotiations, it is difficult to be very specific about most aspects of the content. Therefore, what is laid out below is for guidance only and is fairly generic; not all topics will be covered and some may be subject to modification. Broadly the course will attempt to cover the legal issues that accountants who assist SMEs are likely to deal with or be asked about in the course of their normal work.

Who should attend: Employers and professionals providing advice to small companies and directors of SMEs.

Topics:

Employment Law

- Employment Status, including
 - Recent gig economy cases
 - IR35 – extension to private sector
 - Self-employment generally
- Payroll developments
 - Minimum wage, including sleep ins
 - Working time – dealing with holidays
 - Fallout from furlough
- Vicarious liability - impact of recent cases
- Disability discrimination – key principles from the last year
- Health and safety at work – current concerns
- The rise of home working – special considerations

Company Law

- Directors' duties – new developments
- Personal liability for directors – beware - some important recent cases
- The problem with dividends
- Insolvency – impact of Corporate Insolvency and Governance Act 2020
- Companies House reform

Other Business Law

- The pitfalls of the general partnership
- Recent developments in professional negligence
- GDPR – where are we now?

Speaker: Louise Dunford has been involved in training for accountancy professionals and for commercial companies for over 25 years, specialising in employment law, company law and professional negligence. She has been a consultant for many years for Complete HR Ltd, providing HR support to SME clients on all matters connected with recruitment and employment, including contract drafting, investigations, dismissals, tribunal and settlement work. Louise also had a long running relationship with Portsmouth University, as a lecturer and as an associate lecturer and supervising undergraduate and postgraduate dissertations.

South East					Southern				
Date	Thurs 7 October				Date	Thurs 4 November			
Venue	Crowne Plaza Hotel, Crawley				Venue	Solent Hotel, Whiteley, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	09:00	09:30	11:00	12:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee				Code: OC07C1	Course fee: £110+VAT See p4 for Flexi fee				Code: NO04B1

CHARITIES UPDATE

Speaker: Julia Poulter MAAT FCA

Attendance at this course together with 'Charities Legal Update' (page 58) is offered to registered charities at a combined concessionary fee of £110+VAT (half the standard fee).

Objectives: Charities continue to be affected by developments in accounting, tax, and external scrutiny is greater than ever both in terms of general public interest and interest by the regulator. There has been a lot of newly issued or updated guidance by the UK regulators as a result. This popular half-day course keeps you up to date with all the recent key developments.

Who should attend: Charity finance staff, charity auditors and examiners, advisors and charity trustees, especially treasurers.

Topics:

- Changes to the SORP, in accounting and annual reporting
- Charity regulator developments across the UK
- Revised guidance for auditors and examiners on their duties and rights
- Overview of recent direct tax and VAT issues
- Charity cases of interest

Speaker: Julia Poulter is a Partner at Crowe UK a leading firm of charity auditors and advisors. She has nearly 20 years' experience of auditing and advising a mix of charities, membership bodies, social housing providers, health and social care providers and commercial clients. In her role, Julia has carried out several advisory projects such as technical accounting advice, reserves policy reviews, due diligence, governance and financial sustainability reviews.

Julia has a keen interest in technical matters and training in the sector and regularly trains staff and clients on key sector matters, including accounting, governance, audit committee and trustee responsibilities. Julia represents Crowe as Technical Advisor to the Housing SORP working party and regularly publishes articles and presents seminars for the sector. Julia is also Chair of Trustees at a local homelessness charity so has first-hand experience of the governance challenges in small charities.

Live Online					South East					Southern				
Date	Weds 6 October				Date	Thurs 14 October				Date	Weds 15 September			
Venue	Live online using Zoom				Venue	Mercure Maidstone Great Danes Hotel				Venue	Botley Park Hotel, Botley			
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		09:00	09:30	11:00	12:30		09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee		Code: OC06B1			Course fee: £110+VAT See p4 for Flexi fee		Code: OC14A1			Course fee: £110+VAT See p4 for Flexi fee		Code: SE15A1		

CHARITIES LEGAL UPDATE

Speaker: Louise Dunford LLM LLB Barrister

Attendance at this course together with 'Charities Update' (page 57) is offered to registered charities at a combined concessionary fee of £110+VAT (half the standard fee).

Objectives: This updated and revised course will provide an overview of the most important legal developments in the course of the last 12 months for small and medium sized charities, including practical advice flowing from those decisions. The topic list below is necessarily generic in that it is being drafted in the context of the pandemic, which makes it very difficult to predict what will be most relevant to the sector in 2021. As far as time allows, current preoccupations will be placed in the wider context of the general law, in particular in relation to trustees' duties. We will also look at key Commission guidance and consultation documents, as well as covering the most important legislative changes relevant to small and medium sized charities, with some reference to data protection. The course will include reference to all new cases reported and publications produced up to two weeks prior to the course, but will deal with most of the topics below.

Who should attend: Charities staff, trustees and their advisors.

Topics:

- **Introduction**
 - Which structure? Setting up a charity and the legal implications of the various legal forms
 - Ethics and compliance issues
 - Brands and charities – the pitfalls
 - Improving diversity and inclusion in charities
 - Funding – the challenges going forward
- **Administration of the Charity**
 - Recent CC investigations on administration and charitable status
 - Serious incident reporting – an update
 - Top tips for good risk management
 - Some specific issues e.g. charitable purposes and community led housing
- **Charity trustees**
 - Definition and summary of duties
 - Some practical examples from the ICO
 - Personal liability of trustees in a worsening financial landscape
- **GDPR**
 - Recent guidance, including on health issues in the workforce
 - What have we learned from the Supreme Court in *Morrisons*?
 - Update on FPS
- **Employment Law in the Voluntary Sector**
 - New employment status developments
 - Payroll issues
 - Redundancy and restructuring

Speaker: Louise Dunford has been involved in training for accountancy professionals and for commercial companies for over 25 years, specialising in employment law, company law and professional negligence. She has been a consultant for many years for CompleteHR Ltd, providing HR support to SME clients on all matters connected with recruitment and employment, including contract drafting, investigations, dismissals, tribunal and settlement work. Louise also had a long running relationship with Portsmouth University, as a lecturer and as an associate lecturer and supervising undergraduate and postgraduate dissertations.

South East					Southern				
Date	Thurs 14 October				Date	Weds 15 September			
Venue	Mercure Maidstone Great Danes Hotel				Venue	Botley Park Hotel, Botley			
Time	Reg'n	Course starts	Coffee	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: OC14B1		Course fee: £110+VAT See p4 for Flexi fee			Code: SE15B1	

COMPLETE GUIDE TO VALUATION OF UNQUOTED COMPANY SHARES AND BUSINESSES

Speaker: Jenny Nelder BA FCA FTII

Objectives: This course will cover the basic concepts of valuation, the approach to adopt in different circumstances, issues which arise in valuation work, the differences in approach for tax and other purposes and how to minimise your risk.

Who should attend: Partners, managers and staff who may become involved with share and business valuation issues, whether in practice or in industry, and for all purposes, including sales and purchases, shareholder disputes, tax, employee share awards, incorporation, divorce and other.

Topics: This course will provide an overview of:

- Valuation principles and methodologies
- Factors affecting valuation
- Approaches to giving advice to minimise risk
- Valuing different sizes and types of shareholdings
- The differences between valuation for commercial and fiscal purposes
- Principles from statute and case law, for tax and other valuations
- Valuations for tax purposes and negotiating the best deal for your client
- Goodwill

Speaker: Jenny Nelder is a partner in Bruce Sutherland & Co, an independent firm of unquoted company share and business valuation specialists. She has been involved in valuing shares and businesses for many different purposes since 1981, when she left Touche Ross (now Deloitte). Jenny lectures on share and business valuations for a number of professional bodies and contributes articles on the subject to the professional press. She is a member of the ICAEW Valuation Community.

Live Online					South East				
Date		Tues 28 September			Date		Tuesday 27 April		
Venue		Live online using Zoom			Venue		Mercure Maidstone, Great Danes Hotel		
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: SE28B1		Course fee: £110+VAT See p4 for Flexi fee			Code: AP27B1	

MOVING INTO ADVISORY SERVICES

Speaker: Mark Lee FCA

Objectives: If accountants learned anything from the first lockdown in 2020 it was that clients appreciate regular contact and receiving relevant, timely advice. Whether or not you have maintained this level of service now is the time to take things to the next stage. There has never been more pressure to properly provide advisory services to clients. But it's not always obvious what 'advisory' services means, where to start, how to get paid and how to win new clients for anything beyond compliance work.

Who should attend: Sole practitioners, managers and partners responsible for growing the profitability of their practice.

Topics: At the end of this course you will:

- Appreciate why you will need to do things differently in the future
- Understand which of the 5 types of advisory services you can provide
- Be more confident in your ability to provide a wider range of services to your clients
- Be aware of a range of tech related facilities that will enable you to deliver valuable advice
- Know how other accountants like you have made the transition
- Know how to secure new business at a fair fee
- Be keen to provide advisory services to clients and to charge appropriately

In short, you will become a more effective and attractive accountant able and confident in providing clients with advice on business finances and so much more than recurring compliance work.

Speaker: Mark Lee FCA spends much of his time researching, writing and speaking about what accountants need to do to survive, evolve and thrive into the future.

Mark is passionate about helping individual accountants to achieve more success in their careers and practices. He qualified as a chartered accountant in 1982 and was in practice until 2006. He worked for all sizes of firm including BDO in London who headhunted him from a smaller practice. In more recent years Mark has written and spoken for hundreds of firms and thousands of accountants. His blogposts and online articles have been viewed well over a million times. His talks and advice avoid fluff, hype and waffle. Rather they are always focused on what is practical and commercial.

Mark is also a proud Fellow of the Professional Speaking Association and Treasurer of The Magic Circle, which probably means he is the only truly magical speaker in the UK accountancy profession.

Live Online				
Date	Thurs 16 September			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: SE16A1	

BUSINESSES IN TROUBLE – HELPING YOUR CLIENT IN TIMES OF CRISIS

Speaker: Cathya Djanogly CTA

Objectives: Businesses in financial difficulty tend to re-structure in order to improve performance and financial efficiency, and, ultimately, survive. This talk highlights the various courses of action open to struggling businesses together with their tax implications.

Who should attend: Any tax advisor concerned that some of their clients may struggle financially, particularly, as a result of the economic crisis resulting from the Coronavirus.

Topics:

- The tax implications of ring-fencing a financially burdensome business, company or division (CT/CGT, VAT/TOGC, SDLT), covering share/asset disposals, demergers and hive-down within groups
- The tax implications of restructuring a company's debt (mainly loan relationship rules), covering the rescheduling/release of debt and debt for equity swaps
- The tax implications of insolvency proceedings (mainly corporation tax, group relief etc, but also CGT/ negligible value claims for shareholders)

Speaker: Cathya Djanogly CTA is a tax solicitor and a member of the Stamp Duty Practitioners Group. In addition, she holds a Master of Studies from Cambridge University and a Master in International Business from Sciences-Po Paris (a French 'grande ecole'). She has worked for a 'magic circle' law firm and 'big four' accounting firms (Linklaters, Deloitte and PwC). More recently, Cathya was the cases editor of Tax Journal and the editor of Butterworths VAT and Property, Tolley's Tax Cases and Tolley's VAT Cases for over 5 years.

Cathya has considerable expertise, and has lectured on, diverse areas of UK tax, from VAT, SDLT, corporation tax and tax avoidance, to legislation and case law updates and developments in tax litigation and investigation. Cathya now works mainly as a tax consultant, lecturer and educator.

Live Online				
Date	Thursday 13 May			
Venue	Live online using Zoom			
Time	Wait Room	Course starts	Break	Course ends
	09:00	09:30	11:00	12:30
Course fee: £110+VAT See p4 for Flexi fee			Code: MY13A1	

INSOLVENCY PROCEEDINGS: WHAT YOUR CLIENT NEEDS TO KNOW

Speaker: Cathya Djanogly CTA

Objectives: Understanding the different types of insolvency proceedings and their tax implications in order to be able to advise businesses facing insolvency.

Who should attend: Business and tax advisors wishing to assist their clients in the challenging times of the economic crisis caused by the Coronavirus.

Topics: The talk covers each of the types of insolvency proceedings; CVA's (company voluntary arrangements), Receivership, Administration and Liquidation, explaining how they work, before covering their tax implications:

- The impact for the group (as a result of the company losing beneficial ownership of its subsidiaries). This covers not only group relief from corporation tax, but also corporation tax on chargeable gains on transfers of assets within the group, with potential exit charges, and SDLT and VAT on transfers of property within the group
- The impact for the shareholders of the company in insolvency. This covers the tax treatment of winding-up distributions and of distributions in specie, including land (CGT, SDLT and VAT implications), Entrepreneur's relief from CGT and relief for worthless shares (CGT negligible value claim)
- Cessation of trade and transfer of trade. This covers capital allowances (disposal event), terminal loss relief and carry-forward of losses on transfer of the trade

Speaker: Cathya Djanogly CTA is a tax solicitor and a member of the Stamp Duty Practitioners Group. In addition, she holds a Master of Studies from Cambridge University and a Master in International Business from Sciences-Po Paris (a French 'grande école'). She has worked for a 'magic circle' law firm and 'big four' accounting firms (Linklaters, Deloitte and PwC). More recently, Cathya was the cases editor of Tax Journal and the editor of Butterworths VAT and Property, Tolley's Tax Cases and Tolley's VAT Cases for over 5 years.

She has considerable expertise, and has lectured on, diverse areas of UK tax, from VAT, SDLT, corporation tax and tax avoidance, to legislation and case law updates and developments in tax litigation and investigation. Cathya now works mainly as a tax consultant, lecturer and educator.

Southern					
Date	Thurs 11 November				
Venue	Basingstoke Country Hotel				
Time	Reg'n	Course starts	Coffee	Course ends	
	13:00	13:30	15:00	16:30	
Course fee: £110+VAT See p4 for Flexi fee			Code: NO11B1		

IMPROVING YOUR PERSONAL EFFECTIVENESS

Speaker: Peter Thatcher BSc FCA

Objectives: Feel like you have too much to do? Are you busy at work, but find your to-do list grows ever longer? This course will provide practical ideas that can easily be put into practice to make you more effective in the way that you use your time.

Who should attend: Anyone who needs to improve their personal effectiveness.

Topics:

- Analysing your current role and objectives
- Establishing your priorities and then sticking to them
- Challenging unrealistic deadlines and saying 'no' without causing offence
- Practical tips to help increase effectiveness
- Managing tasks and projects

Speaker: Peter Thatcher has been involved in training and consultancy for over 30 years and heads up Aptus Personal Development Consultants. He specialises in writing and presenting financial reporting workshops around the world to accountants from a wide range of business sectors. These workshops cover recent developments in financial reporting as well as providing in-depth analysis on specific technical issues. Peter also writes and delivers financial analysis, leadership and personal development programmes for a range of organisations based in the UK and overseas. Peter also acts as a personal coach and mentor to leaders and senior managers. For more information visit www.aptuspdcc.co.uk.

Southern				
Date	Tuesday 29 June			
Venue	Solent Hotel, Whiteley, Fareham			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: JN29B1	

COMMUNICATING WITH IMPACT

Speaker: Peter Thatcher BSc FCA

Objectives: All too often people come out of meetings wishing that they had presented their point of view in a different way so that other people would have taken more notice of their opinions and views. This course will help you to make a positive impact in all situations when communicating your ideas and opinions to other people.

Who should attend: Anyone wishing to improve their communications and presentation skills.

Topics:

- Understanding your own strengths and weaknesses
- The importance of preparation and what to prepare
- Adapting your communication style
- Listening effectively and interpreting other people's responses
- Developing emotional intelligence to enhance your message

Speaker: Peter Thatcher has been involved in training and consultancy for over 30 years and heads up Aptus Personal Development Consultants. He specialises in writing and presenting financial reporting workshops around the world to accountants from a wide range of business sectors. These workshops cover recent developments in financial reporting as well as providing in-depth analysis on specific technical issues. Peter also writes and delivers financial analysis, leadership and personal development programmes for a range of organisations based in the UK and overseas. Peter also acts as a personal coach and mentor to leaders and senior managers. For more information visit www.aptuspdcc.co.uk.

South East				
Date	Weds 29 September			
Venue	Mercure Maidstone, Great Danes Hotel			
Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: SE29B1	

CYBER SECURITY AND GDPR UPDATE

Speaker: Dr Stephen Hill BSc (Hons) MLPI CIIP PhD

Objectives:

- Recognise your organisation's responsibilities for data protection
- Understand the GDPR and Data Protection Act 2018
- Identify the safeguards required to protect your data (Principle 6)
- Understand and mitigate against the risks linked to data exposure

Who should attend: Everyone! Data protection is everyone's responsibility.

Topics:

- GDPR & the Data Protection Act 2018 – recap on responsibilities
- How is the digital environment challenging data protection?
- Data security risks and emerging threats including social media and the cloud
- Data protection responsibilities – the 6 Principles
- IT governance as a best practice approach
- Data security and compliance – Principle 6 under the spotlight
- Data loss prevention methods – finding the weak links
- Practical tips to enhance and improve data protection within the organisation

Speaker: Dr Stephen Hill is the managing director of Hill Bingham Ltd specialising in online investigations, cybercrime and data protection and compliance. Stephen spent many years working for a top firm of chartered accountants heading the Fraud and Forensic Group, leading an expert body advising clients on prevention, detection and recovery of fraudulent assets, working closely with organisations in both the public and private sector. He spent over 12 years a Trustee Director of the Fraud Advisory Panel and chaired the Panel's Cybercrime Working Group and continues as an adviser to the board. He is also an honorary member on the steering committee of the London Fraud Forum and is a committee member of the Association of Certified Fraud Examiners UK Chapter.

With an appointment as a Volunteer to the City of London Police Economic Crime Directive, Stephen assists fraud investigators with the aid of online investigation techniques and speaks at schools on the dangers of the Internet in line with his role as a safeguarding and child protection governor at his local primary school.

Live Online					Southern				
Date	Monday 28 June				Date	Thursday 7 October			
Venue	Live online using Zoom				Venue	Basingstoke Country Hotel			
Time	Wait Room	Course starts	Break	Course ends	Time	Reg'n	Course starts	Coffee	Course ends
	13:00	13:30	15:00	16:30		13:00	13:30	15:00	16:30
Course fee: £110+VAT See p4 for Flexi fee			Code: JN28B1		Course fee: £110+VAT See p4 for Flexi fee			Code: OC07B1	

WHY POWER QUERY IS THE MOST IMPORTANT EXCEL DEVELOPMENT EVER – EVEN IF YOU DON'T WORK WITH DATA!

Speaker: Simon Hurst BA ACA

Objectives: To enable attendees to use the Excel Power Query tools to make their use of Excel more reliable, more efficient and more automatic.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on page 3.

Examples will be based on the latest version of Excel but where an earlier version (2010 onwards) differs substantially this will be highlighted on the course.

Who should benefit: Anyone whose use of Excel goes beyond the basics and ventures into the use of lookups and conditional sums. Anyone who works with external data or data stored in Excel worksheets and hasn't yet explored the Power Query tools in detail. Even if you don't work with external data, this course should help you to create spreadsheets that are more reliable and more automatic.

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework.

Topics:

- An introduction to the Power Query/Get & Transform tools
- Power Query techniques that make Excel more dynamic and automatic
- VLOOKUP() RIP – why Power Query replaces all Excel lookup functions
- Think in more dimensions – escape the cell straitjacket
- Use Power Query to solve the insoluble
- Using Power Query to replace PivotTables
- Troubleshooting Power Query problems
- Case study – one-click management accounts: complete automation with Power Query

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Discount fees for ICAEW IT Faculty Members: The courses on pages 66-70 if booked individually, are available to IT Faculty Members for £60+VAT each. Phone 01737 223999 for more details.

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX01A1

GOOD SPREADSHEET PRACTICE: EXCEL FUNDAMENTALS

Speaker: Simon Hurst BA ACA

Objectives: Principle 3 of the ICAEW 20 Principles for good spreadsheet practice states: "Ensure that everyone involved in the creation or use of spreadsheets has an appropriate level of knowledge and competence". This course seeks to cover that attendees have at least the required level of knowledge and competence.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on page 3.

Who should attend: This course is aimed at new or existing users of Excel who wish to ensure that they possess the skills and knowledge required to use Excel efficiently and safely while delivering effective and reliable end results. No particular prior knowledge is required. If you are already an experienced Excel user with a comprehensive understanding of a wide range of Excel features and functions then the course might be of limited direct benefit, although it might still be a useful guide to understanding what others working with spreadsheets in your organisation need to know. Examples will be based on the latest version of Excel but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course.

This course is suitable for the levels "Basic User to General User" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework.

Topics:

- Excel anatomy: how everything fits together and how worksheets and workbooks should be set up to be as efficient and reliable as possible
- Formula fundamentals: cell references, calculations, brackets, what the dollar signs do and why it's essential that you know. The most common Excel formula mistake and why avoiding it will save you time, effort and grief. The importance of Excel Tables.
- Function fundamentals: What functions are and how to use them safely. Key functions SUM(), IF(), SUMIFS(), VLOOKUP()
- Effective formatting: cell formats, Styles, number and date formats, Conditional Formats, Charts and graphics
- Fundamental features: working with data, PivotTables, Data Validation
- Is it right? Testing your spreadsheet and building in checks and controls
- Tips and shortcuts – keyboard and other shortcuts to work more efficiently and impress your colleagues

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Discount fees for ICAEW IT Faculty Members: The courses on pages 66-70 if booked individually, are available to IT Faculty Members for £60+VAT each. Phone 01737 223999 for more details.

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCO website	Code: EX02A1

USING THE LATEST VERSIONS OF EXCEL TO REVOLUTIONISE YOUR SPREADSHEETS

Speaker: Simon Hurst BA ACA

Objectives: Since the introduction of Office 365, significant Excel changes and enhancements have been delivered as frequently as monthly. The increased number of updates makes it increasingly easy to miss a change that could have the potential to dramatically improve your use of Excel. This course covers the most significant changes after the initial introduction of Excel 2016. If you are upgrading from an earlier version, we will also include a PDF detailing the changes from 2007 up to Excel 2016.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on page 3.

Who will benefit: Users of Microsoft Excel that haven't yet upgraded to the latest version and are wondering whether they should. Users of Microsoft Excel that have recently upgraded and want to make sure they're getting the most out of the new version.

This course is suitable for all levels under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/technical/technology/excel/spreadsheet-competency-framework.

Topics will include:

- Why VLOOKUP() is now an X function – a new better, safer, cleverer and easier way to create lookups in Excel
- Dynamic arrays – use one formula to populate hundreds of cells dynamically. One of the most significant structural changes ever made to the way that Excel works and one that can also affect existing workbooks, plus it comes with 7(ish) new functions.
- New functions, including supercharging IF()
- Maps and funnels – new chart types since Excel 2016
- New data types – stocks and geography
- The Excel BI revolution – from spreadsheet to Business Intelligence engine. Where most of the Excel update effort is going.
- Because of the way that Excel is now being continually updated, there are likely to be further significant changes between the production of this overview and the date of the course

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Discount fees for ICAEW IT Faculty Members: The courses on pages 66-70 if booked individually, are available to IT Faculty Members for £60+VAT each. Phone 01737 223999 for more details.

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX03A1

50 ADVANCED TECHNIQUES FOR CREATING INSPIRATIONAL SPREADSHEETS

Speaker: Simon Hurst BA ACA

Objectives: The course is designed to address some more advanced Excel features and capabilities that will be of use to those working with financial data. Some significant new features in recent versions of Excel will be covered, but most of the course will be relevant to users of any Excel version. The intention is to cover areas that provide real practical benefits including making spreadsheets more automatic, more reliable and also increasing their impact through improved presentation.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on page 3.

The examples are based on the latest version of Excel but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course.

Who will benefit: The course will assume a familiarity with some Excel subjects, e.g.:

- Absolute and relative cell references
- Excel functions such as IF(), VLOOKUP(), SUMIF()
- Basic chart creation
- Basic PivotTables

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework. Previous attendance on any existing SESCO Excel courses, or other similar courses, should provide adequate preparation for this course. If you already use complex financial functions, understand array formulae, make extensive use Excel form tools including PivotTables and write or edit VBA code then the course may well be of limited benefit to you.

Topics:

- Advanced use of functions – including using apparently simple functions to save hours of manual effort
- Excel formulae and techniques – including array formulae, alternatives to array formulae, advanced aspects of range names
- Macros and Visual Basic. Creating user defined functions, editing and writing macros. Increasing interactivity and automating spreadsheets with macros
- Data analysis tools – working efficiently with external data and using extended data tools and PivotTable features
- Superpower functions – the functions with hidden powers that can revolutionise your use of Excel
- Presentation – improving general spreadsheet presentation and making charts better. Using the latest Excel graphics features to create inspirational spreadsheets
- How Power Query changes everything. Excel without formulae

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Discount fees for ICAEW IT Faculty Members: The courses on pages 66-70 if booked individually, are available to IT Faculty Members for £60+VAT each. Phone 01737 223999 for more details.

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCO website	Code: EX04A1

MORE POWER TO YOUR PIVOT: PRACTICAL USES FOR EXCEL PIVOT TABLES

Speaker: Simon Hurst BA ACA

Objectives: PivotTables are one of Excel's most powerful features, but they seem to divide Excel users into fanatical advocates and those who just don't see the point. This course will explain how PivotTables can be useful to almost any Excel user. Starting with the basics of using a simple PivotTable to summarise financial data it will show how PivotTables can simplify a range of practical Excel tasks from identifying best-selling products to consolidating branch data and acting as the engine for an automated performance dashboard. The course will also introduce some of the other key Excel features for working with, and presenting, data.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided, together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on page 3.

Examples will be based on the latest version of Excel but where an earlier version (2010 onwards) differs substantially this will be highlighted on the course.

Who will benefit: If your use of Excel includes summarising, analysing, auditing and reporting on any form of financial data you should find this course of value.

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework.

Topics:

- Introduction to PivotTables - from raw data to your top ten products in 5 minutes with no formulae
- Dealing with data - different ways of getting at your data and keeping it updated automatically. Consolidating data from different parts of your organisation
- Manipulating PivotTables - sorting, filtering, grouping and formatting
- Advanced techniques - ad hoc grouping, adding formulae and working with values
- PivotTable as report engine - using a PivotTable to automate the production of management reports
- Using a PivotTable to create an automated performance dashboard
- Latest PivotTable developments - conditional formatting, Excel 2010 slicers. PowerPivot, 3D Map, Power BI and Power Query (now known as 'Get & Transform' in Excel 2016) - possibly the most significant Microsoft Office development of the millennium?

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Discount fees for ICAEW IT Faculty Members: The courses on pages 66-70 if booked individually, are available to IT Faculty Members for £60+VAT each. Phone 01737 223999 for more details.

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESA website	Code: EX05A1

SOUTH EAST, SOUTHERN AND THAMES VALLEY 2021 CPD PROGRAMME

Date	Course	Speaker	D/S	Venue	Time	Page
2021	Why Power Query is the Most Important Excel Development Ever - Even if You Don't Work with Data!	S.Hurst	ALL	W	ANY	66
2021	Good Spreadsheet Practice: Excel Fundamentals	S.Hurst	ALL	W	ANY	67
2021	Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	ALL	W	ANY	68
2021	50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	ALL	W	ANY	69
2021	More Power to Your Pivot: Practical Uses for Excel Pivot Tables	S.Hurst	ALL	W	ANY	70
24 Feb	Complete Guide to Tax Planning for Small Businesses	M.Ward	SO	S	AM	11
24 Feb	Hot Topics in VAT	N.Owen	SO	S	PM	33
25 Feb	Complete Guide to VAT in the Construction Industry	N.Owen	SE	D	AM	37
25 Feb	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	SE	D	PM	45
02 Mar	PAYE and National Insurance Update	A.Durrant	ALL	O	AM	12
02 Mar	A Practical Approach to Forms P11D	A.Durrant	ALL	O	PM	13
04 Mar	PAYE and National Insurance Update	A.Durrant	SE	M	AM	12
04 Mar	A Practical Approach to Forms P11D	A.Durrant	SE	M	PM	13
10 Mar	Introduction to Charity Accounts	B.Telford	ALL	O	AM	50
11 Mar	Trusts: Four Tax Efficient Case Studies and a Disaster	A.Fisher	ALL	O	AM	28
15 Mar	PAYE and National Insurance Update	A.Durrant	TV	CB	AM	12
15 Mar	Capital Taxes Update	M.Ward	TV	CB	PM	27
16 Mar	Introduction to Pension Scheme Accounts	B.Telford	ALL	O	AM	51
17 Mar	Complete Guide to VAT in the Construction Industry	N.Owen	SO	B	AM	37
17 Mar	After Brexit and the Transition - The New Tax Environment	J.Mindell	SO	B	PM	19
23 Mar	SRA Rules Update: The 'New' Rules and the Accountant's Report	J.Taylor	ALL	O	AM	48
24 Mar	Complete Guide to International VAT Issues	N.Owen	SO	B	DAY	34
30 Mar	Introduction to Housing Association Accounts and Audit	P.Herbert	ALL	O	AM	53
20 Apr	Accounting Update for Accountants in Business	G.Loveday	ALL	O	AM	42
20 Apr	Taxation Update for Accountants in Business	M.Ingles	ALL	O	PM	8
20 Apr	Complete Guide to VAT and Property Transactions	N.Owen	SE	CP	AM	36
20 Apr	Practical Problems in UK GAAP	P.Herbert	SE	CP	PM	46
21 Apr	Annual IFRS Update	G.Loveday	ALL	O	AM	44
21 Apr	Corporation Tax Update	G.Mooney	SO	S	AM	17
21 Apr	Complete Guide to IR35	R.Martin	TV	CB	PM	16
27 Apr	Complete Guide to Acting for Small Businesses	M.Ingles	SE	M	AM	29
27 Apr	Complete Guide to Valuation of Unquoted Company Shares and Businesses	J.Nelder	SE	M	PM	59
28 Apr	Pensions: What the Accountant Needs to Know	B.Trunchion	ALL	O	AM	23
29 Apr	HMRC's Investigatory Powers: Topical Issues	A.Gotch	SO	B	AM	18
29 Apr	The Essential Guide to Importing and Exporting	M.Greenbaum	SO	B	PM	21
05 May	Complete Guide to VAT and Property Transactions	N.Owen	SO	B	AM	36
05 May	Practical Problems in UK GAAP	P.Herbert	SO	B	PM	46
06 May	The Accountant on the Farm - A Comprehensive Review	B.Trunchion D.Missen	ALL	O	AM	20
07 May	Accounting and Financial Reporting Update	G.Loveday	SE	F	AM	41
07 May	Taxation Update	M.Ward	SE	F	PM	7
11 May	Payroll Services for Clients: Practical Problems	A.Durrant	SO	S	AM	14
11 May	Capital Taxes Update	M.Ward	SO	S	PM	27

SOUTH EAST, SOUTHERN AND THAMES VALLEY 2021 CPD PROGRAMME

Date	Course	Speaker	D/S	Venue	Time	Page
12 May	Payroll Services for Clients: Practical Problems	A.Durrant	SE	M	AM	14
12 May	Hot Topics in VAT	N.Owen	SE	M	PM	33
13 May	Businesses in Trouble - Helping your Client in Times of Crisis	C.Djanogly	ALL	O	AM	61
13 May	Topical Issues in Insolvency ●	Various	SE	D	DAY	75
17 May	Taxation Update	G.Mooney	ALL	O	AM	7
17 May	Audit and Accounting Update	G.Loveday	ALL	O	PM	40
17 May	Accounting and Financial Reporting Update	G.Loveday	ALL	O	AM	41
17 May	Taxation Update	G.Mooney	ALL	O	PM	7
19 May	Housing Associations Accounting and Audit Update	P.Herbert	ALL	O	AM	54
20 May	A Practical Tax Brush up for Returners	A.Durrant	ALL	O	AM	9
20 May	A Practical Accounting Update for Returners	K.McCaffrey	ALL	O	PM	43
21 May	Accounting Update for Accountants in Business	G.Loveday	SE	D	AM	42
21 May	Taxation Update for Accountants in Business	M.Ingles	SE	D	PM	8
24 May	Audit and Accounting Update	G.Loveday	TV	SC	AM	40
24 May	Taxation Update	G.Mooney	TV	SC	PM	7
25 May	A Complete Guide to Tax and the Family	R.Martin	ALL	O	PM	22
27 May	A Complete Guide to Essential VAT for Charities	N.Owen	ALL	O	AM	35
08 Jun	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	SO	B	AM	45
08 Jun	Construction Industry Refresher	T.Palmer	SO	B	PM	30
09 Jun	Taxation Update	G.Mooney	SE	M	AM	7
09 Jun	Audit and Accounting Update	G.Loveday	SE	M	PM	40
09 Jun	Accounting and Financial Reporting Update	G.Loveday	SE	M	AM	41
09 Jun	Taxation Update	G.Mooney	SE	M	PM	7
10 Jun	Taxation Update	M.Ward	SO	BP	AM	7
10 Jun	Audit and Accounting Update	G.Loveday	SO	BP	PM	40
10 Jun	Accounting and Financial Reporting Update	G.Loveday	SO	BP	AM	41
10 Jun	Taxation Update	M.Ward	SO	BP	PM	7
15 Jun	Accounting Update for Accountants in Business	G.Loveday	SE	M	AM	42
15 Jun	Taxation Update for Accountants in Business	M.Ingles	SE	M	PM	8
16 Jun	Accounting Update for Accountants in Business	G.Loveday	SO	BP	AM	42
16 Jun	Taxation Update for Accountants in Business	M.Ingles	SO	BP	PM	8
17 Jun	Accounting Update for Accountants in Business	G.Loveday	TV	SC	AM	42
17 Jun	Taxation Update for Accountants in Business	M.Ingles	TV	SC	PM	8
23-25 Jun	Taxation Conference 2021 ●	Various	SE	KU	C	75
25 Jun	Taxation Conference 2021 - Topical Tax Tips and Pitfalls *	R.Benneyworth	SE	KU	AM	38
28 Jun	Cyber Security and GDPR Update	S.Hill	ALL	O	PM	65
29 Jun	Dealing with Common Property Transactions	D.Wootten	SO	S	AM	31
29 Jun	Improving Your Personal Effectiveness	P.Thatcher	SO	S	PM	63
30 Jun	Complete Guide to IR35	R.Martin	SE	D	AM	16
06 Jul	Accounting for and Auditing Academy Schools	P.Herbert	ALL	O	AM	47
06 Jul	Complete Guide to Tax Planning for Small Businesses	M.Ward	SE	F	PM	11
07 Jul	Complete Guide to Acting for Small Businesses	M.Ingles	ALL	O	AM	29
09-10 Sep	Insolvency Conference 2021 ●	Various	SE	RU	C	75

SOUTH EAST, SOUTHERN AND THAMES VALLEY 2021 CPD PROGRAMME

Date	Course	Speaker	D/S	Venue	Time	Page
14 Sep	Annual IFRS Update	G.Loveday	ALL	O	AM	44
14 Sep	Capital Gains Tax and Inheritance Tax Refresher	B.Trunchion	ALL	O	PM	25
15 Sep	Charities Update	J.Poulter	SO	BP	AM	57
15 Sep	Charities Legal Update	L.Dunford	SO	BP	PM	58
16 Sep	Moving into Advisory Services	M.Lee	ALL	O	AM	60
21 Sep	Complete Guide to IR35	R.Martin	SO	B	AM	16
21 Sep	Pensions: What the Accountant Needs to Know	B.Trunchion	SO	B	PM	23
22 Sep	Hot Topics in VAT	N.Owen	ALL	O	AM	33
23 Sep	A Practical Tax Brush up for Returners	A.Durrant	ALL	O	AM	9
23 Sep	A Practical Accounting Update for Returners	K.McCaffrey	ALL	O	PM	43
28 Sep	VAT Essentials	D.Wootten	SO	S	AM	32
28 Sep	Complete Guide to Valuation of Unquoted Company Shares and Businesses	J.Nelder	ALL	O	PM	59
29 Sep	Topical Tax Issues for Owner Managed Businesses	D.Wootten	SE	M	AM	10
29 Sep	Communicating with Impact	P.Thatcher	SE	M	PM	64
06 Oct	Corporation Tax Update	G.Mooney	TV	CB	AM	17
06 Oct	Charities Update	J.Poulter	ALL	O	PM	57
07 Oct	Employment and Business Law Update	L.Dunford	SE	CP	AM	56
07 Oct	A Practical Introduction to Payroll	A.Durrant	SO	B	AM	15
07 Oct	Cyber Security and GDPR Update	S.Hill	SO	B	PM	65
12 Oct	Capital Taxes Update	M.Ward	SE	F	AM	27
13 Oct	Trusts: Four Tax Efficient Case Studies and a Disaster	A.Fisher	SO	S	AM	28
14 Oct	Charities Update	J.Poulter	SE	M	AM	57
14 Oct	Charities Legal Update	L.Dunford	SE	M	PM	58
14 Oct	Topical Issues in Insolvency ●	Various	SE	D	DAY	75
18 Oct	Topical Audit Problems and Solutions	J.Selwood	ALL	O	PM	49
19 Oct	Complete Guide to International VAT Issues	N.Owen	SE	D	DAY	34
20 Oct	Medical Taxation: Doctors and Dentists Refresher	B.Trunchion	ALL	O	AM	24
21 Oct	Pensions Accounting, Audit and Regulatory Update	P.Herbert	ALL	O	AM	52
03 Nov	Dealing with Common Property Transactions	D.Wootten	ALL	O	AM	31
03 Nov	Corporation Tax Update	G.Mooney	ALL	O	PM	17
04 Nov	Topical Tax Issues for Owner Managed Businesses	D.Wootten	SO	S	AM	10
04 Nov	Employment and Business Law Update	L.Dunford	SO	S	PM	56
10 Nov	VAT Essentials	D.Wootten	SE	CP	AM	32
11 Nov	Capital Taxes: Four Tax Efficient Scenarios and a Disaster	A.Fisher	SO	B	AM	26
11 Nov	Insolvency Proceedings: What your Client Needs to Know	C.Djanogly	SO	B	PM	62
16 Nov	Accounting Update for Accountants in Business	G.Loveday	ALL	O	AM	42
16 Nov	Taxation Update for Accountants in Business	M.Ingles	ALL	O	PM	8
17 Nov	Taxation Update	G.Mooney	TV	SC	AM	7
17 Nov	Audit and Accounting Update	G.Loveday	TV	SC	PM	40
18 Nov	Accounting Update for Accountants in Business	G.Loveday	TV	SC	AM	42
18 Nov	Taxation Update for Accountants in Business	M.Ingles	TV	SC	PM	8

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Date	Course	Speaker	D/S	Venue	Time	Page
19 Nov	Accounting Update for Accountants in Business	G.Loveday	SE	D	AM	42
19 Nov	Taxation Update for Accountants in Business	M.Ingles	SE	D	PM	8
22 Nov	Accounting Update for Accountants in Business	G.Loveday	SE	M	AM	42
22 Nov	Taxation Update for Accountants in Business	M.Ingles	SE	M	PM	8
23 Nov	Audit and Accounting Update	G.Loveday	SE	F	AM	40
23 Nov	Taxation Update	B.Trunchion	SE	F	PM	7
24 Nov	Accounting Update for Accountants in Business	G.Loveday	SO	BP	AM	42
24 Nov	Taxation Update for Accountants in Business	M.Ingles	SO	BP	PM	8
25 Nov	Audit, Accounting and Taxation Update ●	G.Loveday B.Trunchion	SE	GW	DAY	75
29 Nov	Taxation Update	M.Ward	SE	M	AM	7
29 Nov	Audit and Accounting Update	G.Loveday	SE	M	PM	40
29 Nov	Accounting and Financial Reporting Update	G.Loveday	SE	M	AM	41
29 Nov	Taxation Update	M.Ward	SE	M	PM	7
30 Nov	Taxation Update	M.Ward	ALL	O	AM	7
30 Nov	Audit and Accounting Update	G.Loveday	ALL	O	PM	40
30 Nov	Accounting and Financial Reporting Update	G.Loveday	ALL	O	AM	41
30 Nov	Taxation Update	M.Ward	ALL	O	PM	7
01 Dec	Taxation Update	G.Mooney	SO	BP	AM	7
01 Dec	Audit and Accounting Update	G.Loveday	SO	BP	PM	40
01 Dec	Accounting and Financial Reporting Update	G.Loveday	SO	BP	AM	41
01 Dec	Taxation Update	G.Mooney	SO	BP	PM	7
07 Dec	A Complete Guide to Tax and the Family	R. Martin	SO	S	PM	22
08 Dec	Construction Industry Refresher	T.Palmer	SE	M	PM	30
09 Dec	Audit and Accounting Update	G.Loveday	SO	VB	AM	40
09 Dec	Taxation Update	M.Ward	SO	VB	PM	7

KEY: ● = Events not available on the Flexiticket * = 09:15 – 12:30

AM = 09:30 – 12:30 **PM** = 13:30 – 16:30 **D** = Day course – timings vary – see individual course information

C = Residential conference - timings vary – see individual conference information

O = Online live course using Zoom **W** = Recorded online course accessed via the SESCA website: sesca.co.uk

KEEP TRACK OF YOUR CPD

To help you keep your CPD records up to date we send to every delegate on the Flexiticket scheme an annual report in January, of courses attended in the previous 12 months. Reports can be requested at any time of the year, please email courses@sesca.co.uk or call 01737 223999.

VENUES

Set out below is information on all our venues.

Directions to all venues are available on the website sesca.co.uk/venues

South East

Mercure Maidstone Great Danes Hotel	M	Ashford Road, Hollingbourne, Maidstone, ME17 1RE Tel: 01622 528565
University of Reading	RU	Whiteknights, PO Box 217, Reading, RG6 6AH Tel: 0118 987 5123
Crowne Plaza London Gatwick Airport	CP	Langley Drive, Crawley, RH11 7SX Tel: 01293 608608
Crowne Plaza Felbridge Gatwick	F	London Road, East Grinstead, RH19 2BH Tel: 01342 895 200
Denbies Wine Estate	D	London Road, Dorking RH5 6AA Tel: 01306 876616
University of Kent	KU	Kent University, Canterbury, CT2 7LX Tel: 01227 828000
Goodwood House	GW	Goodwood, Chichester, PO18 0PX Tel: 01243 755000

Southern

Botley Park Hotel	BP	Winchester Road, Boorley Green, Botley, SO32 2UA Tel: 0344 879 9034
Solent Hotel	S	Rookery Avenue, Whiteley, Fareham, PO15 7AJ Tel: 01489 880000
Village Hotel, Bournemouth	VB	Wessex Fields, Deansleigh Road, Bournemouth, BH7 7DZ Tel: 01202 055205
Basingstoke Country Hotel	B	Scures Hill, Nately Scures Nr. Hook RG27 9JS Tel: 0871 221 0255

Thames Valley

Coppid Beech Hotel	CB	John Nike Way, Binfield, Bracknell, RG12 8TF Tel: 01344 303333
Sindlesham Court	SC	Mole Road, Sindlesham, Wokingham, RG41 5EA Tel: 0118 978 3902

Online Courses

Live Online	O	Live online using Zoom – delegates will be emailed the <u>joining information two days before the course date</u>
Recorded Online	W	Recorded course accessed via the website – delegates will be emailed the information needed to access the course

SESCA ANNUAL RESIDENTIAL TAX CONFERENCE

23 – 25 June
at the University of
Kent, Canterbury

A two-and-a-half-day residential conference providing an intensive update on taxation for general practitioners as well as specialists and accountants in business. £350+VAT, or £330+VAT if booked and paid for by 30 April 2021.
(Accommodation not included)

SESCA ANNUAL RESIDENTIAL INSOLVENCY CONFERENCE

9 – 10 September
at the University of
Reading

A value for money update over one and a half days, for Insolvency Practitioners covering a wide range of technical and professional issues. £300+VAT, or £285+VAT if booked and paid for by 31 May 2021.
(Accommodation not included)

TOPICAL ISSUES IN INSOLVENCY SEMINARS

13 May and 14 October
at Denbies Wine Estate,
Dorking

Spring and Autumn one day seminars providing technical and professional updating for Insolvency Practitioners and their senior staff on a range of topical issues. £185+VAT per day, or book both days for £320+VAT

SESCA ANNUAL AUDIT, ACCOUNTING & TAXATION UPDATE

25 November
at Goodwood House

Essential one day technical update in the stately setting of Goodwood House near Chichester. Course fee includes three course gourmet lunch. £275+VAT, or £250+VAT if booked and paid for by 30 June 2021.

FLEXITICKET EXPLAINED

The Flexiticket offers one of the best value for money CPD discount schemes. Tickets are transferable and may be used by any number of individuals from different organisations, allowing smaller and sole practitioners and members in business to 'club together'. Tickets are valid for up to 13 months. All half day courses use one place, full day courses use two places. Here are some Frequently Asked Questions to explain the scheme:

What will it cost?

£320+VAT for 4 places or £740+VAT for 12 places i.e. as little as £61.67+VAT per place. A 25 place Maxiticket is also available to high volume users for £1470+VAT. 2020's prices have been frozen for 2021.

How long is my Flexiticket valid for?

Your Flexiticket is valid for up to 13 months e.g. if the first course booked takes place in March 2021 your ticket will start on 1 March 2021 and will expire on 31 March 2022. Places must be used on courses which take place within the validity period of the ticket.

Where are the courses held?

Throughout the South East, live online using Zoom and recorded online for Excel courses available via the website sesca.co.uk. Maps and directions are available at sesca.co.uk/venues.

Which courses is the ticket valid on?

All half and whole day courses in the South East, Southern and Thames Valley Flexiticket programmes, live online courses and recorded online Excel courses, subject to availability.

When should I buy my ticket?

You can book your ticket and reserve places at any time. We will not invoice you until the 1st of the month in which the first course you wish to attend takes place. Thus, you can ensure your places on popular courses well in advance.

Do I have to use the Flexiticket on 4, 12 or 25 different courses?

No. The ticket can be used by any number of individuals on any number of courses totalling either 4, 12 or 25.

Do I have to be a South East, Southern or Thames Valley member to be eligible for the scheme?

No. The courses are designed to be of interest to other professionals and members of the wider business community as well as Chartered Accountants. Members may find some topics of interest to clients.

Do I have to book specific courses when I apply for a Flexiticket?

No. Just let us know before the course you wish to attend that you will be coming, by phone, email or by post by using the booking form on page 4. However, early booking on certain courses including the audit, accounting and tax updates is strongly advised as these are very popular.

What if I am unable to, or fail to attend a course on which I have booked?

A course place must be cancelled by email, and acknowledged by us, at least two clear working days before the course date to enable you to use the place on another course within the validity period of your ticket (i.e. if the course is on the morning of Thursday 18 November, notice must be received by midnight on Monday 15 November). Alternatively, you may request the documentation. If you choose to be sent the documentation this will constitute use of one place on your ticket. If no prior notice of cancellation is received and you do not attend, you will be sent the course notes using one place on your ticket. No refunds are made on places not used.

What if I lose track of the number of places used on my ticket?

Just give us a call and we will let you know how many places you have left. We can also provide you with a printed record of your attendances. A CPD report is automatically sent to all delegates in January.

How do I apply for a Flexiticket?

Simply complete the form on page 4 and send it with your remittance to SESCA Ltd., 2b, Chart House, Effingham Road, Reigate, Surrey, RH2 7JN. Alternatively you can email or call to request your new Flexiticket. You will receive an email confirming your Flexiticket bookings and a VAT invoice.

Will I receive delegate information on the courses I wish to attend?

All the delegate information you will require including venue and course timings is provided on your Flexiticket bookings report. You will not receive separate joining instructions for individual courses held at venues. You will be emailed individual course joining information for each online course booked two days before the course date.

I have a further query.....

Phone Amelia, Mick or Sally 01737 223999 or email: courses@sesca.co.uk. Full courses details are to be found at sesca.co.uk



**2020
PRICES ARE
HELD FOR
2021**

SESCA

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