2010
Coursedirectory

CPD, Professional Development, Tax Specialist and Personal, Management and Business Development Skills Courses for Today's Accountants

www.mercia-group.co.uk

Mercia is one of the UK's largest providers of training and support services to the accountancy profession. Our programmes and courses are planned in response to what is happening in the professional environment. In this brochure you will find a selection of core, highly topical and specialist courses for all members of your team delivered nationwide.

Our presenters are very experienced and knowledgeable professionals and their delivery is always from a practical perspective. We don't just inform you about the facts but aim to interpret rules and regulations and explain how they will affect you and your clients.

If you can't find the course you are looking for or would like help in putting a programme together for your team, please get in touch.

Liz Coates
Director
liz.coates@mercia-group.co.uk

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REGISTERED CPD PROVIDER ACCA 2010

Mercia is recognised by the ACCA as an approved training provider. All of our courses qualify for CPD hours as required by all UK accountancy bodies.

Ways to Meet Your Training Needs

Our training is available in various packages to meet the changing and varied needs of today's accountant. Whether you are looking for just one specific course, an in-house update or the complete training solution we can provide what is right for you. A programme of core CPD courses is also available on CD so you have ultimate flexibility when meeting your CPD requirements.

Individual courses

Our CPD, Tax Specialist, Personal, Management and Business Development Skills courses and Professional Development (PD) courses can be booked on an ad hoc basis. Our CPD courses start from £85, our Tax Specialist courses from £185, our Personal, Management and Business Development Skills courses from £185 and PD courses from £45.

Flexible season tickets

Our flexible season ticket costs just £465* for 10 CPD places with any number of additional places at just £46.50* per place. You can send five people on two courses, one person on ten courses or any other combination that would help you to meet your needs. Unlike many of our competitors, you don't have to book additional places in blocks and once you have purchased 10 places, each additional place will cost just £46.50* throughout 2010. You can also mix and match venues. See pages 62 - 74 for details.

Our season ticket option only applies to CPD courses (not tax specialist, management or professional development courses). Those CPD courses eligible for the season ticket option are marked 'Season ticket option available' on the course outline.

*£690/£57.50 in Northern Ireland.

Training group membership

Training group membership offers unbeatable value and flexibility plus it allows you to budget effectively with fixed monthly payments. If you are dedicated to providing training for all members of staff, membership is the perfect solution for your practice. For further details visit www.mercia-group.co.uk

National membership

National members can attend all courses in this brochure (except Tax Specialist and Management and Business Development Skills courses) as part of their membership fee. For further details visit www.mercia-group.co.uk

Digital options

We are continually expanding our range of digital training offerings which now give greater choice and flexibility for those who do not attend the live event. For full details of what is available see page 3.

In-house courses and programmes

We work together to meet the specific needs of individual practices. We can organise a complete programme of bespoke courses which can be supplemented with access to our open courses. We currently provide in-house courses and programmes for firms ranging from 2 to 80 plus partners. Whatever the size of your practice, please contact us if you would like further details.

Further details about all of the above options can be found at www.mercia-group.co.uk

Digital Training

Our digital offering continues to expand and helps us to offer an enhanced and unrivalled training service. Whilst we believe attending a live course is still the most effective way of keeping up to date our digital alternatives offer greater choice and flexibility.

Webinars

Our new and interactive seminars, 'webinars', are streamed directly to your desktop via the internet, allowing you to obtain valuable training from the comfort of your own home or office, whilst maximising your working time.

Each live hour long webinar features an experienced presenter who delegates can interact with via text based questions. Course notes are also available to download from the seminar site.

If you can't make the date or time of the live webinar a pre-recorded version is also available.

Each webinar costs £75 per participant with discounts for local and national members.

For details of the current programme visit www.mercia-group.co.uk/webinars

CPD courses on CD

A selection of our core CPD courses is filmed on a rolling basis. The courses can be purchased individually or you can become a digital subscriber. Training group members receive 12 of our most popular courses on CD as part of their annual membership fee.

Individual CDs

The CD purchase price is based on the number of partners in your practice.

Sole practitioner	**£55**
2-4 partners	**£135**
5-9 partners	**£250**
10 or more partners	**£500**

The CD titles available are listed on the training area of our website at www.mercia-group.co.uk

Digital subscription

As a digital subscriber you will receive a selection of 12 popular CPD courses over a 12-month period. The cost of digital subscription is based on the size of your practice with a charge of £300 per firm plus £100 per partner and professional member of staff*. The subscription will be invoiced in advance but can be paid in 12 monthly instalments. You can enrol as a subscriber online at www.mercia-group.co.uk

*Professional members of staff includes all staff working more than 20 hours per week who are involved in chargeable work.

Professional Development courses online

Following the success of our CPD course on CD, we are developing a series of Professional Development courses online. The first in the series is An Introduction to Bookkeeping which includes the material covered by both our Principles of Bookkeeping and Bookkeeping: The Next Stage courses.

The online version includes an audio presentation, PowerPoint slides and case studies. Staff can access the course from their desk and can either work through it in one sitting or break it down into smaller modules, giving greater flexibility to work around their other commitments.

The cost is £300 per firm less 25% discount for local and national members. This allows access to the course until 31 July 2010. If you then choose to renew your subscription for a further year the cost is £200 per firm (less 25% for local and national members).

Look for the available on CD symbol for courses available on CD

Conferences

Throughout the year we offer a number of one day conferences which focus on specialist areas not normally covered by our CPD courses.

Partners and senior staff who specialist in these areas will have the opportunity to gain a wider appreciation of the factors affecting their clients by listening to a number of different experts present their views.

Each conference is an annual event and an ideal opportunity to keep up to date with developing and emerging issues.

In addition to our specialist sector conferences we also hold an annual partners' conference. The theme of the conference varies from year to year but is always on a topical practice management subject. In 2009 this was 'Winning in the Downturn'.

The conferences planned for 2010 are:

Charities

London – 2 March 2010
Midlands – 18 March 2010

Advising the Elderly

Midlands – 21 April 2010

Solicitors

Midlands – 20 May 2010
London – 9 June 2010

Healthcare

June 2010

Partners

June 2010

Farming

October 2010

Hospitality

December 2010

Where the exact dates are not yet know these will be advertised both on our website and through mailings nearer the time of the event.

CPD Courses

For more than 25 years Mercia has provided high quality training to the accountancy profession. With a client base of over 5000 independent practices, we offer course programmes in more than 50 different locations nationwide.

CPD courses assume a high level of existing knowledge and are designed therefore to update participants on new developments in both core and specialist areas. All courses are supported by comprehensive course notes, which serve as a guide during the presentation and a reference document at a later date. All of our speakers are highly experienced first class presenters whether drawn from our internal lecturing team or a pool of external presenters. Speaker details are shown on pages 76 - 77.

Courses planned for 2010 are shown on the following pages in the order of:

- Business advisory
- Audit and accountancy
- Taxation
- Personal skills and management development
- IT skills

Courses available on CD are indicated by this symbol.

If you would like to discuss any of these courses with us, including the possibility of organising an in house course, please contact Liz Coates at liz.coates@mercia-group.co.uk or call her on 0116 258 1200.

Employment Law Update

OBJECTIVES

Increasingly recognised as primary advisers to their clients, accountants working in practice have to be familiar with a wide range of business priorities and in today's litigious age, employment issues are regularly at the top of their agenda.

This course has been designed to help raise the practitioners' awareness of what they need to know in connection with employment law and practice.

This course will:

- Demonstrate priority areas of employment law affecting SMEs
- Raise participants' awareness of situations where their clients should respond to the requirements of current employment legislation.

CONTENT

The course will cover the legislation and relevant employment tribunal cases in relation to:

- Developments in employment legislation
- Fair and unfair dismissals
- Discrimination
- Family Friendly Policies
- Employers duty of care
- Contract terms and conditions.

CPD HOURS: 3

Venue	Date	Time	Speaker
Bristol	14 Jun	13:45-16:45	Debbie Taylor
Lancaster	27 May	14:00-17:00	Mike Griffiths

£85 plus VAT per person

Season Ticket Option Available

How to Act as an Executor

OBJECTIVES

In the past many practitioners have turned down opportunities to act as executors of clients' wills due to difficulties in obtaining probate and the need to involve another professional. As it is now possible for some accountants to apply for grants of probate, there is a real opportunity for practitioners to participate in this profitable area.

The course is designed to act as a brief refresher on wills and estate planning. It will also be looking to demystify probate and its attendant procedures. One area, which will be looked at, is the relationship with solicitors, as it is important to work with them rather than against them in view of traditional relationships.

CONTENT

- Wills and estate planning
- The family - husbands and wives, intestacy and provision for dependents
- The business - business property relief, the interaction with capital gains tax
- Wills and will drafting - formalities and wording, liaison with solicitors and drafting, contents, post-death variations
- Probate
- Obtaining Probate - collecting details of assets, HMRC accounts, preparation of grants
- Administration - collecting assets, settling debts, finalising and distributing estate, accounts
- Taxation matters to consider

CPD HOURS: 3

Venue	Date	Time	Speaker
Leicester	10 May	14:00-17:00	Bob Truncheon
London	20 May	14:00-17:00	Bob Truncheon

£110 plus VAT per person

Insolvency Awareness

OBJECTIVES

Being able to recognise the early warning signs and understanding the alternative options available is a necessary skill for all business advisers. This course will seek to outline the various Insolvency procedures with particular emphasis on recent changes in the law. The Insolvency Act 2000 has resulted in the possibility of a moratorium on creditors' rights to encourage voluntary arrangements and the Enterprise Act has made significant changes to bankruptcy law and has almost abolished receiverships while extending the use that can be made of administrations.

CONTENT

- Voluntary arrangements
- Changes to bankruptcy law
- The new corporate moratorium
- How to enforce security
- The new administration procedures including pre-pack administrations
- Winding up procedures
- The position of directors

CPD HOURS: 3

Venue	Date	Time	Speaker
Exeter	31 Mar	14:00-17:00	Mike Griffiths

£85 plus VAT per person

Season Ticket Option Available

Management and Financial Advice for the Smaller Business

OBJECTIVES

The course is designed to enable practising accountants to review a client business and:

- identify areas where they can give practical help which will increase profitability
- identify performance indicators which might indicate strengths and weaknesses in the clients business
- identify management information and systems which will enable management to control the business better.

CONTENT

This course will include:

- Cost effective banking
- Break-even budgeting
- Assessing product profitability
- Debt collection methods
- Post audit checklist.

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast	24 Jun	13:45-16:45	Nigel Smith

£115 plus VAT per person

Managing Risk in the Professional Practice

OBJECTIVES

Effective risk management by accountancy practices not only reduces exposures to court action and to disciplinary investigation, it also improves the professional reputation of the practice. It leads to clarity in the expectations of clients, closer meeting of those expectations and higher quality advice. This course gives clear, practical guidance on how to get it right and what to do if it goes wrong.

CONTENT

- Why is risk management important and who is responsible?
- The extent of claims and losses
- The role of the partners
- Engagement risk
- Getting the engagement letter right
- Disclaiming and limiting liability
- Working papers
- Professional indemnity
- Complaints handling
- The disciplinary process
- Responsibilities to third parties
- Performance and quality assurance

CPD HOURS: 3

Venue	Date	Time	Speaker
Bury St Edmunds	17 Mar	15:00-18:00	Phil Frost
Edinburgh*	12 Oct	09:30-12:30	Phil Frost

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Obtaining Finance for the Smaller Business

OBJECTIVES

The course is designed to enable practicing accountants to:

- Identify a proposal worth evaluating
- Prepare a business plan to take to a financier
- Identify the correct sources of finance for the client's business.

CONTENT

This course will include:

- Client information checklist
- Risk evaluation checklist
- Preparation of the Business Plan
- Sources of finance and gearing
- Finance for the entrepreneurial business

CPD HOURS: 3

Venue	Date	Time	Speaker
Bristol	23 Mar	13:45-16:45	Nigel Smith

£85 plus VAT per person

Season Ticket Option Available

Preparing and Implementing a Business Sale and Exit

OBJECTIVES

Business owner/managers are often looking to sell their businesses either now or in the future but really do not know where to turn to achieve this successfully. The accountant and business advisor is well placed to take advantage of this significant fees and client support opportunity by assisting any business to boost its profitability and therefore its value over time in preparation for a sale. The accountant can then play a key role in helping and supporting the business owner(s) to sell for the maximum value and exit the business successfully, providing they have the required skills and knowledge.

CONTENT

Targeted at newcomers to this area and those with some experience of buying and selling businesses, in this ½ day interactive seminar we cover the following essential points...

- who might buy the business
- valuing the business
- building business profitability
- marketing the business
- preparing the business for 'viewing'
- developing an exit strategy
- gathering a professional team
- key documents and processes involved
- charging the right fees for this service.

CPD HOURS: 3

Venue	Date	Time	Speaker
Oxford	10 Feb	15:30-18:30	Jim Thomas

£85 plus VAT per person

Season Ticket Option Available

Accountancy and Assurance Update

available on CD

OBJECTIVES

On completion of the course, participants will:

- be aware of all Accounting Standards, Exposure Drafts and UITF Pronouncements issued since the last update course
- understand which pronouncements affect them and the action that should be taken
- understand any other pronouncements and discussion documents made during the period which affect accounting.

CONTENT

The course will cover all publications by the Accounting Standards Board (ASB) issued since the last update course.

The precise content of the seminar will be determined nearer to the date of the course and will be available from Mercia on request.

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Aberdeen	9 Sep	13:30-16:30	John Welsford
Belfast*	2 Mar	13:45-16:45	Darren Leiser
Billericay	9 Mar	14:00-17:15	Jane Everingham
Birmingham	20 May	09:15-12:15	Darren Leiser
	20 May	14:30-17:30	Darren Leiser
Bracknell	7 Oct	09:30-12:45	Andrew Güntert
Bristol	26 May	09:30-12:30	Darren Leiser
	26 May	13:45-16:45	Darren Leiser
Bury St Edmunds	15 Jun	15:00-18:00	Darren Leiser
Cambridge	29 Apr	15:00-18:00	Phil Frost
Derby	14 Apr	14:30-17:30	Phil Frost
Edinburgh	6 Sep	13:30-16:30	John Welsford
Exeter	13 May	14:00-17:00	Darren Leiser
Glasgow	8 Sep	13:30-16:30	John Welsford
Gravesend	29 Mar	14:00-17:15	John Welsford
Hatfield	1 Mar	14:00-17:15	John Welsford
High Wycombe	10 Mar	14:00-17:15	Jane Everingham
	25 Nov	14:00-17:15	John Welsford
Ipswich	24 Mar	09:30-12:45	Jane Everingham
	24 Mar	14:00-17:15	Jane Everingham
Lancaster	16 Mar	14:00 - 17:00	Andrew Güntert
Leeds	8 Mar	14:00-17:15	John Welsford
Leicester	13 Apr	09:15-12:15	Phil Frost
	13 Apr	14:00-17:00	Phil Frost
	21 Apr	14:00-17:00	Phil Frost
London	30 Mar	09:30-12:45	John Welsford
	30 Mar	14:00-17:15	John Welsford
Londonderry*	1 Mar	13:45-16:45	Darren Leiser
Manchester	9 Mar	14:00-17:15	John Welsford
Milton Keynes	3 Mar	14:00-17:15	John Welsford
Newcastle	18 Mar	15:30-18:30	Jane Everingham
Newbury	15 Nov	14:00-17:15	John Welsford
Northampton	28 Apr	09:15-12:15	Darren Leiser
	17 May	14:30-17:30	Darren Leiser
Norwich	23 Mar	13:30-16:45	Jane Everingham
Nottingham	12 May	09:15-12:15	Darren Leiser
	18 May	14:00-17:00	Darren Leiser
Oxford	16 Mar	15:30-18:30	Phil Frost
	15 Apr	15:30-18:30	Phil Frost
Peterborough	10 May	15:00-18:00	Phil Frost
Southend-on-Sea	2 Mar	14:00-17:15	Jane Everingham
Stirling	7 Sep	13:30-16:30	John Welsford
Tunbridge Wells	22 Mar	14:00-17:15	John Welsford
Watford	4 Mar	14:00-17:15	John Welsford
West Bromwich	11 May	09:15-12:15	Darren Leiser
	11 May	14:30-17:30	Darren Leiser
York	17 Mar	14:00-17:15	Jane Everingham

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Accounting for Properties and the Audit Issues

available on CD

OBJECTIVES

This course explains problems associated with the accounting and audit of properties. It addresses existing problems and new developments that will impact on accounting presentation and the audit approach especially in light of falls in property values.

CONTENT

Accounting issues

- SSAP 19: accounting for investment properties
- FRS 15: measurement and valuation
- FRS 12: provisions, including treatment of dilapidations
- SSAP 9: properties held as trading stock
- FRS 19: deferred tax
- Accounting for revaluation gains and losses
- FRS 5: revenue recognition and sale and repurchase agreements
- UITF 5: transfers from current to fixed assets
- UITF 28: accounting for operating lease incentives
- Some ventures and SPVs
- Future developments including the impact on international accounting standards

Audit issues

- Key risk areas, including title, valuations, relying on experts, going concern, revenue recognition provisions and laws and regulations
- Overview of current position regarding service change audits.

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Billericay	9 Jun	14:00-17:15	Phil Frost
Bracknell	11 May	14:00-17:15	Phil Frost
Gravesend	6 May	14:00-17:15	Phil Frost
High Wycombe	4 May	14:00-17:15	Phil Frost
London	8 Jun	09:30-12:45	Phil Frost
	8 Jun	14:00-17:15	Phil Frost
Manchester	17 May	14:00-17:15	Phil Frost
Newcastle	26 May	15:30-18:30	Phil Frost
Norwich	20 May	13:30-16:45	Phil Frost
Watford	18 May	14:00-17:15	Phil Frost
York	25 May	14:00-17:15	Phil Frost

£85 plus VAT per person

Season Ticket Option Available

Acting for Clubs and Associations

OBJECTIVES

Special category audits need to have a special effort applied. Entities registered as Industrial and Provident Societies or Friendly Societies under the 1974 Act are among the most common of these special category audits. This course will concentrate on these organisations and will cover the following areas:

CONTENT

- The main legislation governing clubs and associations including the results of recent consultations on updating the legislation, and changes already implemented
- The de-regulation provisions and the impact these have on the assignment
- The other main laws and regulations applying to clubs and associations, for example the Licensing Act and the Gambling Act
- The impact of the Clarified ISAs (UK and Ireland) on the audit procedures to be applied and the main audit risks and how to deal with them
- How to undertake an independent accountants assignment
- Other topical issues,
- Likely future developments
- Adding value to the assignment.

CPD HOURS: 3

Venue	Date	Time	Speaker
London	8 Feb	14:00-17:00	Val Steward
Nottingham	25 Feb	14:00-17:00	Val Steward

£110 plus VAT
per person

Acting for Dentists: An Update

OBJECTIVES

The face of dentistry has changed dramatically over the last five years and most dentists now have potentially highly profitable businesses which will become less dependent on the NHS despite the introduction of a new contract/PDS. However, the credit crunch has had large effects on some areas of private practice so dentists must, therefore, adapt to this aggressive environment or see their practice shrink.

CONTENT

- The NHS and dentists – an overview
- Fees/income sources for dentists
- Private dental practices
- Structure – associates, support structures, technicians, hygienists
- Accounts, tax, VAT, PAYE problems
- Tax planning – superannuation/pension provision; structure – sole practitioners, associates and companies
- Implications on buying and selling a dental practice

CPD HOURS: 3

Venue	Date	Time	Speaker
Bristol	25 Feb	13:45-16:45	Bob Trunchion
London	20 Sep	14:00-17:00	Bob Trunchion
Nottingham	1 Oct	14:00-17:00	Bob Trunchion

£110 plus VAT
per person

Acting for Farmers: An Update

OBJECTIVES

This course will provide a detailed review of the issues affecting agricultural businesses.

It will not cover basic accounting and tax issues but will focus on what is changing in the sector and how businesses will need to respond to these changes.

CONTENT

- Background on farm profitability
- Policy update
- The single payment system, SFP
- Trading and the future of SFP
- The Scottish Rural Development Program
- Capital values of land and agricultural rents
- Tax considerations
- Market and profitability outlook for the various sectors; arable, dairy, beef and sheep
- How the industry is changing and will continue to change
- Need to move to profitable farming with reduced subsidy by 2012/13
- Income stream options
- Different sector responses

CPD HOURS: 3

Venue	Date	Time	Speaker
Dundee	9 Jun	09:30-12:30	Watson Bell

£110 plus VAT
per person

Acting for FSA Clients: An Introduction

OBJECTIVES

Most mortgage, general insurance, stock broking and IFA type business are regulated by the FSA. This course is designed to introduce delegates to the FSA regime and to ensure that they have the compliance procedures and knowledge to comply fully with the rules and undertake audit and accounts work effectively.

CONTENT

This course will cover:

- The key rules of the FSMA 2000
- Part IV authorisation
- The FSA web site
- Permanent information
- Engagement and representation letters
- RMAR reporting requirements
- Client monies and assets
- Audit exempt work
- Risk and common errors
- Audit procedures for planning, doing and completion stages

Case studies will form part of the course.

CPD HOURS: 6 (Audit Related: 6)

Venue	Date	Time	Speaker
Coventry	17 Mar	09:30-17:00	Ian Fletcher
London	16 Nov	09:30-17:00	Ian Fletcher

£230 plus VAT
per person

Acting for FSA Clients: A Refresher

OBJECTIVES

This course is designed to refresh delegates on the FSA regime and to ensure that they are up to date with all the latest FSA developments and rule changes.

It will also revisit key accounts and audit issues and any new APB, ICAEW, ACCA pronouncements in this specialist area.

CONTENT

This course will cover:

- FSA rule changes
- APB, ICAEW, ACCA pronouncements
- Changes to the FSA web site
- Practice assurance and/or audit regulations
- Guidance on the preparation of accounts and the audit of FSA regulated businesses.

Case studies will from part of this course.

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Coventry	29 Sep	14:00-17:00	Ian Fletcher
London	15 Mar	14:00-17:00	Ian Fletcher

£130 plus VAT
per person

Acting for General Insurance & Mortgage Brokers

OBJECTIVES

The objectives of this course are to ensure that all auditors of mortgage and general insurance brokers are fully prepared for the FSA regulatory environment and understand the procedures they must adopt to comply with their responsibilities to the client and the FSA.

CONTENT

- An overview of the FSMA 2000
- Permanent information required
- Preparation and resources needed
- Planning and risk management
- Systems and the high level standards
- Conduct of business rules
- The specific requirement of an FSA audit as compared to a true and fair audit
- Completion and partner review
- Reporting and whistle blowing requirements
- Annual returns and reporting
- Accounting requirements for audit exempt clients
- New FSA and other regulatory developments

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
London	20 Apr	14:00-17:00	Ian Fletcher
Nottingham	24 Nov	14:00-17:00	Ian Fletcher

£130 plus VAT
per person

An Introduction to Solicitors' Accounts Rules

OBJECTIVES

The report required by the Law Society under the Solicitors' Accounts Rules 1998 is one of the more onerous tasks of the independent accountancy practice. Continuing shortages of clients' money has led the Law Society to look carefully at the role of the accountant. It is very difficult to check that a Solicitor is complying with the Solicitors' Accounts Rules 1998 unless you understand what the current rules are. On completion of this course participants will not only know what the rules consist of and what they say but will also understand what they require a Solicitor to do in practice.

CONTENT

The content will include:

- Outline of client money rules
- Operation of client account
- Deposit interest
- Accountant's report requirements
- Case studies illustrating working's of rules including examples of:
  - client monies cash book and ledger accounts
  - disbursements - professional and other
  - transfers of costs.
- Problem areas

CPD HOURS: 6 (Audit Related: 6)

Venue	Date	Time	Speaker
High Wycombe	12 Jan	09:30-17:15	Andrew Paul
Leicester	19 Jan	09:30-17:00	Andrew Paul
London	13 Apr	09:30-17:00	Andrew Paul

£110 plus VAT per person

Audit and Accountancy Update

OBJECTIVES

On completion of the course, participants will:

- be aware of all Accounting Standards, Exposure Drafts, UITF Pronouncements, Auditing Standards and Practice Notes issued recently
- understand which pronouncements affect them and the action that should be taken
- understand any other pronouncements and discussion documents made during the period which affect accounting and auditing.

CONTENT

The precise content of the seminar will be determined nearer the date of the course and will be available from Mercia on request.

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
High Wycombe	19 Apr	14:00-17:15	John Welsford
	8 Sep	09:30-12:45	Alan Bonham

£85 plus VAT per person

Season Ticket Option Available

Audit and Accounts of Pension Schemes

OBJECTIVES

The session will provide an update on issues relating to the audit and accounts of occupational pension schemes, identify critical aspects relating to the audit and accounts and how to deal with them.

CONTENT

- Update on legislation
- The Pensions Regulator's role
- Codes of Practice issued by the Pensions Regulator
- Review of the latest Practice Note
- Reclassification of schemes types
- Latest tax return issues for Small Schemes
- Contribution issues and the revised audit report
- Requirement to have proper payments / contribution schemes
- Pension scheme controls
- Consideration of the revised SORP and its effect on the Annual Report
- Audit reports
- Audit risk and approach
- Going concern issues and schemes in wind-up

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Glasgow	2 Dec	09:30-12:30	Darren Leiser

£110 plus VAT per person

Audit Update

available on CD

OBJECTIVES

On completion of the course, participants will:

- be aware of relevant Auditing Standards, Practice Notes, Technical Releases and other audit pronouncements issued since the previous update course
- understand which pronouncements affect them and the action that should be taken, particularly with regard to International Auditing Standards
- be aware of common problem areas in the audit of owner managed businesses and how to avoid them.

CONTENT

- Auditing standards issued or revised in the 12 months prior to the course
- Latest guidance on owner managed business audits, including PN26 and its future
- Audit reports: A reminder of all the changes to the wording of reports and to signing procedures
- Companies Act 2006: A practical overview of the impact of other changes on the auditor
- Going concern: Guidance from the APB and the impact on the audit report
- POB report and QAD/ACCA feedback from visits
- The Clarified ISAs: An overview of what to expect and when

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Aberdeen	1 Dec	13:30-16:30	Darren Leiser
Belfast*	2 Mar	09:30-12:30	Darren Leiser
Billericay	19 Apr	14:00-17:15	Andrew Güntert
Birmingham	29 Mar	14:30-17:30	John Selwood
Bracknell	13 Apr	14:00-17:15	Andrew Güntert
Bristol	4 Oct	13:45-16:45	John Welsford
Cambridge	18 Feb	15:00-18:00	John Welsford
Derby	27 Apr	14:30-17:30	John Selwood
Exeter	10 Nov	14:00-17:00	Andrew Güntert
Glasgow	2 Dec	13:30-16:30	Darren Leiser
Gravesend	21 Apr	14:00-17:15	Darren Leiser
High Wycombe	29 Apr	14:00-17:15	Darren Leiser
Ipswich	20 Apr	14:00-17:15	Darren Leiser
Lancaster	9 Nov	14:00-17:00	Darren Leiser
Leicester	17 Feb	09:15-12:15	John Welsford
	30 Mar	14:00-17:00	John Selwood
London	13 Apr	09:30-12:45	Darren Leiser
	13 Apr	14:00-17:15	Darren Leiser
Londonderry*	1 Mar	09:30-12:30	Darren Leiser
Manchester	5 May	14:00-17:15	Darren Leiser
Milton Keynes	26 Apr	14:00-17:15	Andrew Güntert
Newbury	27 Apr	14:00-17:15	Darren Leiser
Newcastle	15 Apr	15:30-18:30	Darren Leiser
Northampton	17 Feb	14:30-17:30	John Welsford
	26 Apr	14:30-17:30	John Selwood
Norwich	22 Apr	13:30-16:45	Darren Leiser
Nottingham	16 Feb	09:15-12:15	John Welsford
	31 Mar	14:00-17:00	John Selwood
Oxford	11 Nov	15:30-18:30	John Welsford
	24 Nov	15:30-18:30	John Welsford
Peterborough	19 Apr	15:00-18:00	John Selwood
Sudbury	28 Oct	15:00-18:00	Andrew Güntert
Tunbridge Wells	26 Apr	14:00-17:15	Darren Leiser
Watford	21 Apr	14:00-17:15	Andrew Güntert
West Bromwich	11 Feb	09:15-12:15	John Welsford
	11 Feb	14:30-17:30	John Welsford
York	14 Apr	14:00-17:15	Darren Leiser

* Alternative prices apply at these venues

£85 plus VAT per person — Season Ticket Option Available

Adding Value to Audits

OBJECTIVES

Many firms of accountants and auditors are not good at demonstrating that the accounts production or audit has been a valuable exercise. Many clients will therefore still view their annual audit as a statutory nuisance. Is there a way to improve the firm's profitability and increase the value the client receives?

The course considers how to add value for the audit firm not just its clients. This course also explores ideas for ways in which the client's both actual and perceived value of assignments can be improved.

On completion of the course participants will have had an opportunity to reflect on all relevant areas where they could provide greater benefit.

CONTENT

- Adding value - where to start?
- Knowing enough about the client
- Value of our work - what we do and what we could do
- The role of non-audit services – ethics and commercial imperatives
- Communication with clients
- Analytical procedures and benchmarking
- Adding value for us - assignment and resource control
- Implementation

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Oxford	28 Apr	15:30-18:30	Jane Everingham
	20 May	15:30-18:30	Jane Everingham

£85 plus VAT per person — Season Ticket Option Available

Basic Principles of Company Secretarial Practice

OBJECTIVES

Participants on this course will learn about common company secretarial requirements with emphasis on the smaller limited company. The course examines the documentation routinely needed by a limited company incorporated under the 2006 and earlier Companies Acts.

CONTENT

The content includes:

- The types of limited company
- Corresponding with Companies House
- Common statutory forms
- The statutory books
- Minutes and meetings

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	12 Feb	09:30-12:30	Kris Taylor
High Wycombe	10 Feb	09:30-12:45	Kris Taylor
Lancaster	19 May	14:00-17:00	Kris Taylor
London	15 Feb	14:00-17:00	Kris Taylor

£85 plus VAT per person

Charities: Current Issues

available on CD

OBJECTIVES

Accounting for charities is subject to continual change. Recent developments include legislative changes as well as regulatory developments.

This course will consider the impact in charity accounts that arise from these changes. It will also address key auditing issues.

CONTENT

- Charities Act 2006 - implementation issues including changes in thresholds and registration of exempt and excepted charities
- Other regulatory developments including charity commission guidance on public benefit
- Accounting issues including SORP Information Sheets and FRS 30
- Audit and assurance issues including Practice Note 11 (revised), going concern issues, independent examinations and whistle blowing
- Topical tax issues affecting charities

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Belfast*	4 Oct	13:45-16:45	David Gallagher
Birmingham	14 Dec	14:30-17:30	David Gallagher
Bristol	9 Mar	13:45-16:45	David Gallagher
Cambridge	2 Dec	15:00-18:00	David Gallagher
Derby	13 Dec	14:30-17:30	David Gallagher
Exeter	28 Sep	14:00-17:00	David Gallagher
Leicester	1 Dec	14:00-17:00	David Gallagher
Northampton	30 Nov	09:15-12:15	David Gallagher
Nottingham	7 Dec	14:00-17:00	David Gallagher
West Bromwich	9 Dec	14:30-17:30	David Gallagher

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Common Accounting Problems

available on CD

OBJECTIVES

Using practical and many real life examples the course will provide solutions to common accounting problems.

CONTENT

- FRS 5 - Revenue recognition
- Transactions with directors - Company law
- FRS 8 - Related parties
- FRS 11 - Impairment of fixed assets and goodwill
- FRS 12 - Provisions and contingencies
- FRS 15 - Fixed assets
- SSAP 21 - Leases and HP contracts
- Small company thresholds
- The Directors' Report - Business Review

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Aberdeen	11 May	13:30-16:30	Alan Bonham
Billericay	28 Sep	14:00-17:15	Alan Bonham
Bracknell	9 Nov	09:30-12:45	Phil Frost
Bury St Edmunds	22 Sep	15:00-18:00	John Welsford
Edinburgh	12 May	13:30-16:30	Alan Bonham
Glasgow	10 May	13:30-16:30	Alan Bonham
Gravesend	7 Sep	14:00-17:15	Alan Bonham
Hatfield	22 Sep	14:00-17:15	Phil Frost
High Wycombe	8 Sep	14:00-17:15	Alan Bonham
Ipswich	8 Sep	09:30-12:45	Phil Frost
	8 Sep	14:00-17:15	Phil Frost
Leeds	21 Sep	14:00-17:15	Phil Frost
London	9 Sep	09:30-12:45	Phil Frost
	9 Sep	14:00-17:15	Phil Frost
Manchester	12 Oct	14:00-17:15	Alan Bonham
Milton Keynes	7 Oct	14:00-17:15	Phil Frost
Newbury	30 Sep	14:00-17:15	Alan Bonham
Newcastle	6 Oct	15:30-18:30	Phil Frost
Norwich	23 Sep	13:30-16:45	Alan Bonham
Southend-on-Sea	14 Oct	14:00-17:15	Phil Frost
Stirling	13 May	13:30-16:30	Alan Bonham
Tunbridge Wells	20 Sep	14:00-17:15	Phil Frost
Watford	5 Oct	14:00-17:15	Alan Bonham
York	11 Oct	14:00-17:15	Alan Bonham

£85 plus VAT per person

Season Ticket Option Available

Detecting Fraud and Advising on Preventing Fraud

OBJECTIVES

This course has been designed and developed to reflect the increased attention being given to fraud and also the changing role of the practitioner given the increase in audit exemption limits.

Although practitioners are generally aware of their role and responsibility in preventing and detecting fraud, their clients and the general public are not. Obviously changes in the money laundering rules and regulations have also increased the importance of this area and highlighted the dangers of getting it wrong.

The course will assess where and how frauds take place within businesses and other organisations and the ways in which practitioners can advise clients on preventing and detecting fraud. There will be extensive use of practical illustrations, examples and case studies.

CONTENT

- What is fraud?
- The work and publications of the Fraud Advisory Panel
- Indicators of fraud and fraudsters
- The requirements of ISA 240 (Fraud), ISA 250 (Laws and Regulations), and the deficiencies detected by QAD, and the impact of the Money Laundering Regulations/POCA
- Assessing the risk of fraud and examples of common frauds
- Reacting to fraud
- Advising clients as to their vulnerability for fraud and carrying out fraud surveys

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Belfast*	2 Nov	09:30-12:30	Andrew Güntert
Londonderry*	1 Nov	09:30-12:30	Andrew Güntert
Oxford	18 Feb	15:30-18:30	Andrew Güntert
	2 Mar	15:30-18:30	Andrew Güntert

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Gearing Up for Clarified ISAs

OBJECTIVES

The main objective of the course is to prepare delegates for the introduction of the APB's Clarified ISAs (UK & Ireland) for audits of periods ending on or after 15 December 2010. This will involve looking at both the new additional requirements of the Clarified ISAs and also the current areas where regulators suggest the existing ISAs are not being adequately complied with.

CONTENT

- The IAASB's Clarity Project and its adoption by the APB
- The key areas of change including groups, related parties and materiality
- The continued focus of the ISAs on risk and the revised Core ISAs
- Deficiencies of existing ISA files as identified by Regulators and file reviewers including the Ethical Standards for Auditors
- The revised and extended Practice Note 26 "Guidance on Smaller Entity Audit Documentation"
- Practical actions to take
- Review of revised audit documentation illustrated with practical examples.

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Birmingham	26 May	14:00-17:00	Andrew Güntert
Bristol	17 May	14:00-17:00	Andrew Güntert
Leeds	18 May	14:00-17:00	Andrew Güntert
Leicester	20 May	14:00-17:00	Andrew Güntert
London	5 May	14:00-17:00	Andrew Güntert
Manchester	6 May	14:00-17:00	Andrew Güntert

£110 plus VAT per person

IFRS for SMEs

OBJECTIVES

The requirements of full IFRSs are unsuitable for most private entities. As a result the International Accounting Standards Board has developed the IFRS for SMEs. This course will explore the requirements of the standard; how it differs from full IFRS and UK GAAP and set out which companies are able to apply the standard and when this can happen.

CONTENT

- The development of the IFRS for SMEs
- Which companies are required to, or permitted to, use the standard
- Key differences from full IFRSs and from UK GAAP
- Implications for implementation by UK companies
- Illustrative financial statements and disclosure checklist
- First time adoption

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Coventry	29 Mar	14:00-17:00	Phil Frost
London	28 Apr	14:00-17:00	Phil Frost

£110 plus VAT per person

Laws and Regulations for the Practising Accountant

OBJECTIVES

Accountants in practice need familiarity with a wide range of laws and regulations, both those that have been in existence for some time (such as minimum wage, working time and data protection regulations) and those which are relatively new.

This need arises firstly in the auditing context, where ISA 250 on the Consideration of Law and Regulations requires auditors to consider the implications of non-compliance and to carry out certain procedures. Secondly the accountant is the key adviser to clients on the relevant legislation they need to be aware of to run their businesses and finally the practice itself needs to comply with the appropriate statutory regulations.

One of the areas in the course will be the use and application of practical case studies aimed at the needs of practitioners.

CONTENT

- Employment law including recent significant changes
- Health and safety
- Licences, regulations and other laws:
  - planning
  - transport
  - data protection
  - consumer protection

NB. This course is not intended for staff who already have an in-depth knowledge of the legislation mentioned above (ie. Personnel or Human Resources Specialists).

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Birmingham	8 Mar	14:30-17:30	Andrew Güntert
Derby	23 Mar	14:30-17:30	Andrew Güntert
Leicester	17 Mar	09:15-12:15	Andrew Güntert
Northampton	1 Mar	09:15-12:15	Andrew Güntert
Nottingham	24 Mar	09:15-12:15	Andrew Güntert
Peterborough	15 Mar	15:00-18:00	Andrew Güntert
West Bromwich	18 Mar	09:15-12:15	Andrew Güntert
	18 Mar	14:30-17:30	Andrew Güntert

£85 plus VAT per person — Season Ticket Option Available

Limited Liability Partnerships

OBJECTIVES

LLPs have now been with us for over 6 years and nearly 20,000 have been formed. However, the decision to operate as an LLP or to convert to an LLP is not a simple one. At the end of this course participants will understand clearly the advantages and disadvantages of an LLP and the practical issues involved in using an LLP or of converting to an LLP. The SORP sets out the accounting treatment for areas where LLPs differ from companies. This course will explain clearly what the complex requirements are and how they should be implemented.

CONTENT

- Introduction to LLPs
- Advantages of an LLP
  - The main reasons for forming an LLP and the disadvantages
- Limited Liability
  - What this means
  - Personal liability of members – is it a problem?
- The accounting of LLPs
  - The legal requirements for true and fair accounts
  - Content of the accounts
  - Audit and filing requirements
- LLP SORP
  - Main implications of the new SORP
  - Allocation of profits
  - Members annuities
  - Members remuneration and interests
- The taxation of LLPs
- Treatment of members' remuneration

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Belfast*	11 May	09:30-12:30	John Welsford
Bristol	17 Jun	14:00-17:00	John Welsford
Coventry	24 May	14:00-17:00	John Welsford
High Wycombe	3 Nov	09:30-12:45	John Welsford
Lancaster	29 Jun	14:00-17:00	John Welsford
Leeds	8 Jun	14:00-17:00	John Welsford
London	23 Jun	14:00-17:00	John Welsford
Londonderry*	10 May	09:30-12:30	John Welsford

* Alternative prices apply at these venues

£110 plus VAT per person

Maximising Profit and Minimising Risk in Smaller Audits

available on CD

OBJECTIVES

Conducting ISA compliant audits whilst making good recoveries is proving increasingly difficult, if not impossible, to achieve.

Many firms are experiencing a reduced volume of audit work, a steady decline in recoveries and have concerns about the ever changing rules and increasing engagement risk.

This seminar focuses on ensuring firms reflect on any weaknesses in their current audit approach. By considering opportunities for change they will ensure they are on the right track, striving to strike the right balance between risk and profit.

CONTENT

- Recurring compliance weaknesses
- What to do about them
- Risk assessments
  - what really happens in practice?
  - how to record and address the right risks
  - minimising risk from the outset
- Ensuring the right people do the right work, in the right areas, in the right way
  - spotlight on what the RI needs to do
- Successful monitoring of recoveries
  - planning for profit
  - do your measures produce the right outcome for you and your clients?

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Billericay	20 Oct	14:00-17:15	David Gallagher
Bristol	13 May	13:45-16:45	Andrew Güntert
Gravesend	6 Oct	14:00-17:00	Andrew Güntert
Hatfield	14 Oct	14:00-17:15	Andrew Güntert
High Wycombe	4 Oct	14:00-17:15	Andrew Güntert
Ipswich	11 Oct	14:00-17:15	Andrew Güntert
Leeds	5 Oct	14:00-17:15	Andrew Güntert
London	25 Oct	09:30-12:45	Andrew Güntert
	25 Oct	14:00-17:15	Andrew Güntert
Manchester	26 Oct	14:00-17:15	Andrew Güntert
Milton Keynes	21 Oct	14:00-17:15	David Gallagher
Newbury	13 Oct	14:00-17:15	Andrew Güntert
Newcastle	18 Oct	15:30-18:30	David Gallagher
Norwich	13 Oct	13:30-16:45	David Gallagher
Tunbridge Wells	12 Oct	14:00-17:15	Andrew Güntert
Watford	14 Oct	14:00-17:15	David Gallagher

£85 plus VAT per person — Season Ticket Option Available

Money Laundering Update

OBJECTIVES

Most practice staff are aware of the requirements of the rules and regulations and what they must do to avoid breaking the law. However, are they applying them correctly in practice?

Our experience is that firms are making far fewer reports than anticipated. Is this because there are fewer crimes or that people are failing to report them? The 3rd EU Money Laundering Directive required member states to issue revised Regulations and the new Regulations came into effect in the UK on 15 December 2007. Participants will understand the available guidance and the practical effect of the revised regulations. The course will significantly increase awareness of the issues and provide practical guidance on what should be reported and how.

CONTENT

- Update on the law and regulations
- Revised money laundering regulations
  - the differences and effects
- How to avoid doing too much!
- What should be reported and how
  - are your internal procedures working?
  - a series of examples to illustrate when reports are required
- CDD (Customer Due Diligence) and identity checks
  - what is a risk based approach?
  - what the JMLSG say
  - the CCAB guidance and recent ICAEW Tax Faculty guidance
- Interaction with other rules and regulations, ISAs and professional ethics
- Practical consequences of the first four years

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Belfast*	2 Nov	13:45-16:45	Andrew Güntert
High Wycombe	3 Nov	14:00-17:15	John Welsford
Londonderry*	1 Nov	13:45-16:45	Andrew Güntert
Glasgow	8 Sep	09:30-12:30	John Welsford

* Alternative prices apply at these venues

£110 plus VAT per person

Practical Auditing Problems and their Solutions

available on CD

OBJECTIVES

This course provides practical guidance about regular problems arising on audits of smaller companies through the use of worked examples and case studies, in the context of the requirements of the ISAs (UK & Ireland).

CONTENT

- Problems in planning
  - determining the form of report
  - obtaining sufficient understanding of the entity and its environment
  - assessing and using materiality
  - tailoring audit programmes to reflect risk
  - documenting and assessing issues on fraud, and laws and regulations
- Problems in doing the work
  - problem areas identified by QAD and cold file reviews
- Problems in completion
  - events after the balance sheet date
  - going concern
  - file review
  - getting the accounts right
  - closing down the file

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Birmingham	19 Oct	14:30-17:30	Phil Frost
Derby	23 Nov	14:30-17:30	Phil Frost
Edinburgh	9 Feb	13:30-16:30	Andrew Güntert
Glasgow	11 Feb	13:30-16:30	Andrew Güntert
Leicester	10 Nov	09:15-12:15	Phil Frost
Northampton	11 Nov	09:15-12:15	Phil Frost
Nottingham	4 Nov	09:15-12:15	Phil Frost
Peterborough	28 Oct	15:00-18:00	Phil Frost
West Bromwich	8 Nov	14:30-17:30	Phil Frost

£85 plus VAT per person

Season Ticket Option Available

Solicitors' Accounts Rules - A Practical Refresher

OBJECTIVES

The report required by the Solicitors' Regulation Authority under the Solicitors' Accounts Rules 1998 is one of the more onerous tasks of the independent accountancy practice. Although the rules have not been substantially revised since their implementation in 2000 there have been minor amendments and it is vital that staff are fully conversant with the current regulations.

It is also common for firms to have only a small number of these assignments so a refresher on a regular basis is likely to be of benefit to staff undertaking these assignments.

CONTENT

The course will be a combination of formal lecturing and practical case studies which will cover the key aspects of the current Solicitors' Accounts Rules.

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Leeds	24 Mar	14:00-17:00	Sally Hutchings
Leicester	19 Apr	14:00-17:00	Sally Hutchings
London	28 Apr	14:00-17:00	Sally Hutchings

£85 plus VAT per person

Solicitors' Accounts Rules Update

OBJECTIVES

The report required by the Solicitors' Regulation Authority under the Solicitors' Accounts Rules 1998 is one of the more onerous tasks of the independent accountancy practice.

On completion of this course participants will understand completely the changes made to the rules in the last couple of years including those introduced with effect from 31 March 2009. In addition they will have revised some of the basic requirements and been updated on current problems being encountered by the SRA.

CONTENT

- SAR 98 – Changes introduced in July 2008 and March 2009
- Common errors found by the SAR and Reporting Accountants
- Where problems may occur under SAR 98
- How the reporting accountant should approach risk areas

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Exeter	22 Feb	14:00-17:00	John Welsford
High Wycombe	13 Sep	14:00-17:15	Mike Ulrich

£110 plus VAT per person

The Reporting Requirements of Small Companies

OBJECTIVES

This course considers the issues arising from the preparation of accounts of small private companies and groups.

CONTENT

- Small company status
- Abbreviated accounts
- Audit exemption
- Changes introduced by the Companies Act 2006
- FRSSE 2007 changes
- Key differences between FRSSE and the full accounting standards
- Directors' reports and accounting policies
- Directors and related party transactions and disclosures
- Common problems

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Belfast*	11 May	13:45-16:45	John Welsford
Bristol	7 Dec	09:30-12:30	Phil Frost
	7 Dec	13:45-16:45	Phil Frost
Exeter	6 Dec	14:00-17:00	Phil Frost
Londonderry*	10 May	13:45-16:45	John Welsford

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Understanding Group Accounts

OBJECTIVES

At the end of the day participants will have developed skills in the following areas:

- Production of consolidated accounts under the acquisition method
- Understanding of exemptions from preparing group accounts and the exclusion of subsidiaries from the consolidated financial statements
- Disposals, piecemeal acquisitions, associates and joint ventures
- Merger accounting and group reconstructions
- The audit of group financial statements

CONTENT

The course follows a workshop style format with a mixture of formal lecturing supplemented with case studies/questions to ensure understanding of the following areas:

- Types of investment and subsequent treatment in the consolidated financial statements
- Intra group balances, fair value adjustments and goodwill
- Changes to group structures including disposals and piecemeal acquisitions
- Problem areas with the audit of group financial statements

CPD HOURS: 6 (Audit Related: 6)

Venue	Date	Time	Speaker
Exeter	23 Feb	09.30-16.30	Darren Leiser
London	17 Jun	09:30-17:00	Darren Leiser
Nottingham	29 Jun	09:30-14:00	Darren Leiser

£110 plus VAT per person

The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors

OBJECTIVES

The correct treatment of transactions with directors remains a difficult and complex area. The impenetrable requirements of Schedule 6 of the 1985 Companies Act are being replaced by the less detailed regulation of the Companies Act 2006. However the difference in the accounts will not be significant due to continued application of FRS 8. On top of this HM Revenue & Customs and DSS continue to enforce the correct tax treatment more rigidly and the penalties for incorrect treatment increase.

This course will use a series of case studies to revise the principles involved. The object will be to take a number of transactions involving directors and consider in detail the legal and tax consequences and the disclosure requirements. The case studies will be based upon the Companies Act 2006 law but will highlight the differences from the 1985 Act.

CONTENT

- Expense payments to directors
- Benefits in kind
- Directors' current accounts
- Amounts drawn in advance of remuneration
- NIC implications
- PAYE implications
- Companies Act 2006 - disclosure requirements for full statutory accounts and abbreviated accounts
- Connected persons - Companies Act 1985
- Legality of transactions and possible consequences
- FRS 8 : related parties and disclosure of transactions

This course contains little formal lecturing. Participants will review case studies and their feedback will form the basis for discussions.

CPD HOURS: 3 (Audit Related: 3)

Venue	Date	Time	Speaker
Aberdeen	13 Oct	13:30-16:30	Phil Frost
Birmingham	28 Oct	09:15-12:15	John Welsford
	28 Oct	14:30-17:30	John Welsford
Cambridge	27 Oct	15:00-18:00	John Welsford
Derby	25 Oct	14:30-17:30	John Welsford
Edinburgh	12 Oct	13:30-16:30	Phil Frost
Glasgow	11 Oct	13:30-16:30	Phil Frost
Leicester	28 Sep	14:00-17:00	John Welsford
	26 Oct	09:15-12:15	John Welsford
Northampton	27 Sep	14:30-17:30	John Welsford
	26 Oct	14:30-17:30	John Welsford
Nottingham	29 Sep	09:15-12:15	John Welsford
	12 Oct	14:00-17:00	John Welsford
Peterborough	30 Sep	15:00-18:00	John Welsford
Stirling	7 Sep	09:30-12:30	John Welsford
West Bromwich	11 Oct	09:15-12:15	John Welsford
	11 Oct	14:30-17:30	John Welsford

£85 plus VAT per person

Season Ticket Option Available

Back to Basics: VAT

OBJECTIVES

By the end of the course participants will have reviewed the VAT return form and have identified key areas where a simple document can lead to complex problems for clients.

CONTENT

- How VAT works
- Common output problems
- The timing of supplies
- Common input problems
- Some common special schemes
- The course will be structured around a model VAT return.

Participants should bring a calculator.

CPD HOURS: 3

Venue	Date	Time	Speaker
High Wycombe	10 Feb	14:00-17:15	Kris Taylor

£85 plus VAT per person

Back to Basics: Inheritance Tax

OBJECTIVES

To familiarise participants with the principles of inheritance tax for individuals and trusts including fundamental computational aspects.

CONTENT

The course will include:

- General overview
- Lifetime transfers
- General valuation principles
- Exemptions and Reliefs
- Occasions of charge for trusts
- Administration
- Case studies

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	30 Mar	14:00-17:00	Pat Nown
High Wycombe	2 Nov	14:00-17:15	Pat Nown
Lancaster	3 Mar	14.00-17.00	Pat Nown
London	12 Mar	14:00-17:00	Pat Nown
Nottingham	22 Mar	14:00-17:00	Pat Nown

£85 plus VAT per person

Back to Basics: Trusts

OBJECTIVES

To introduce the basic principles of trusts and the computations necessary for trust tax compliance. This course will not cover tax planning ideas using trusts.

CONTENT

The course will include:

- Types of trusts and their uses
- Income and capital gains tax computations
- Administration
- Key events and their consequences
- Case studies

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	30 Mar	09:30-12:30	Pat Nown
High Wycombe	2 Nov	09:30-12:45	Pat Nown
Lancaster	3 Mar	09.30-13.00	Pat Nown
London	12 Mar	09:30-12:30	Pat Nown
Nottingham	22 Mar	09:30-12:30	Pat Nown

£85 plus VAT per person

Budget 2010

OBJECTIVES

This course will give you the opportunity to consider the Chancellor's recent Budget statement. In particular it will focus on the impact of the proposed legislation on your clients.

CONTENT

- Personal taxation
- Business taxation
- Capital taxes
- VAT

The precise content of this course cannot be determined at the time of going to print but will be available from Mercia on request nearer the time of the course.

CPD HOURS: 3

Venue	Date	Time	Speaker
High Wycombe	29 Mar	14:00-17:15	Simon Birkett
Leicester	13 Apr	14:00-17:00	Mark Ward
London	14 Apr	14:00-17:00	Mark Ward

£110 plus VAT per person

Business Tax: Problem Areas

OBJECTIVES

The course will refresh and update participants' awareness of some of the issues which affect the agreement of profits arising from a trade for unincorporated and incorporated businesses.

CONTENT

- Profit computations - expense deductions including interest relief and whether expenditure is repairs or capital
- Current issues with corporation tax and associated companies
- Treatment of loans and trading debts of companies
- Loss relief for the unincorporated business- ensuring tax efficient use of losses
- Capital allowances – a review of the opportunities to maximise plant capital allowances

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	22 Apr	13:30-16:30	Phil Williams
Bristol	20 Oct	09:30-12:30	Phil Williams
	20 Oct	13:45-16:45	Phil Williams
Edinburgh	21 Apr	13:30-16:30	Phil Williams
Glasgow	20 Apr	13:30-16:30	Phil Williams

£85 plus VAT per person

Season Ticket Option Available

Capital Taxes and the Family Company

OBJECTIVES

The successful growth of a business brings the need to mitigate the impact of capital taxes – CGT on a sale and IHT on passing down the business. The introduction of Entrepreneurs' Relief has caused a rethink on CGT planning, but long term IHT planning remains an important consideration

CONTENT

How does Entrepreneurs' Relief work?

- Material disposals
- Associated disposals
- Getting the shareholding right

Securing business property relief

- Reminder of the conditions for BPR on shares and property

Issues on the sale of a company

- Emigration
- Paper for paper transactions
- Earn out arrangements
- Purchase of own shares

Issues on passing down the family company

- Shareholding at the start
- Lifetime transfers of shares
- Use of trusts
- Making sure that BPR is used in will planning

CPD HOURS: 3

Venue	Date	Time	Speaker
Exeter	23 Nov	14:00-17:00	Andrew Burgess

£85 plus VAT per person

Season Ticket Option Available

Capital Taxes - Recent Developments

available on CD

OBJECTIVES

Capital Gains Tax (CGT) changes centre around the abolition of taper relief and the introduction of the more restrictive Entrepreneurs' Relief. The 32% gap between the top income tax rate and the CGT rate gives an extra incentive to plan for capital but also means that HMRC will look more closely at their anti-avoidance legislation.

On the inheritance tax side, the preservation and use of BPR remains a key area of planning.

Add into this the fact that by the time this course is held there could be a different government in power and much could be about to change.

CONTENT

- The CGT regime post 6 April 2008 including a review of Entrepreneurs' Relief
- Anti avoidance legislation - transactions in securities and land
- Maintaining IHT reliefs
- Points from recent cases

CPD HOURS: 3

Venue	Date	Time	Speaker
Billericay	24 Jun	14:00-17:15	Pat Nown
Bracknell	15 Jun	09:30-12:45	Pat Nown
Bristol	24 Nov	13:45-16:45	Andrew Burgess
Gravesend	23 Jun	14:00-17:15	Pat Nown
Hatfield	15 Jun	14:00-17:15	Andrew Burgess
High Wycombe	22 Jun	14:00-17:15	Pat Nown
Ipswich	9 Jun	09:30-12:45	Pat Nown
	9 Jun	14:00-17:15	Pat Nown
Leeds	22 Jun	14:00-17:15	Andrew Burgess
London	17 Jun	09:30-12:45	Pat Nown
	17 Jun	14:00-17:15	Pat Nown
Manchester	16 Jun	14:00-17:15	Pat Nown
Milton Keynes	1 Jul	14:00-17:15	Andrew Burgess
Newbury	28 Jun	14:00-17:15	Andrew Burgess
Newcastle	23 Jun	15:30-18:30	Andrew Burgess
Norwich	7 Jun	13:30-16:45	Pat Nown
Southend-on-Sea	30 Jun	14:00-17:15	Andrew Burgess
Tunbridge Wells	14 Jun	14:00-17:15	Pat Nown
Watford	16 Jun	14:00-17:15	Andrew Burgess

£85 plus VAT per person

Season Ticket Option Available

Corporation Tax Refresher

OBJECTIVES

To give delegates a refresher and an update on corporation tax developments, with particular emphasis on the planning opportunities available to smaller and medium-sized enterprises.

CONTENT

- Finance Act 2009 changes
- Maximising small companies rate - using divisions and sales companies
- Tax efficient extraction of funds for owner managers
- Close companies - pitfalls and planning opportunities
- Maximising capital allowance claims
- Research & Development tax credit
- Relief for goodwill and other intangible fixed assets
- The substantial shareholdings exemption
- Recent changes to the taxation of groups of companies
- Other topical issues

CPD HOURS: 3

Venue	Date	Time	Speaker
Billericay	11 May	14:00-17:15	Martyn Ingles
Bracknell	15 Jun	14:00-17:15	Bob Trunchion
Gravesend	14 Jun	14:00-17:15	Bob Trunchion
Hatfield	15 Apr	14:00-17:15	Martyn Ingles
High Wycombe	26 May	14:00-17:15	Bob Trunchion
Ipswich	30 Jun	09:30-12:45	Bob Trunchion
	30 Jun	14:00-17:15	Bob Trunchion
Lancaster	14 Jun	14:00-17:00	Mark Morton
Leeds	17 May	14:00-17:15	Bob Trunchion
London	27 May	09:30-12:45	Bob Trunchion
	27 May	14:00-17:15	Bob Trunchion
Manchester	13 Apr	14:00-17:15	Martyn Ingles
Milton Keynes	23 Jun	14:00-17:15	Bob Trunchion
Newbury	13 May	14:00-17:15	Bob Trunchion
Newcastle	8 Jun	15:30-18:30	Martyn Ingles
Norwich	29 Jun	13:30-16:45	Bob Trunchion
Southend-on-Sea	20 Apr	14:00-17:15	Martyn Ingles
Tunbridge Wells	25 May	14:00-17:15	Martyn Ingles
Watford	24 Jun	14:00-17:15	Bob Trunchion
York	7 Jun	14:00-17:15	Bob Trunchion

£85 plus VAT per person

Season Ticket Option Available

Dealing with HMRC Enquiries Under the New Regime

OBJECTIVES

The course is designed to cover all aspects of self assessment and corporate enquiries by local tax districts under the new regime. This will include practical tips and a review of the relevant legislation.

Many practitioners feel nervous when dealing with HMRC, especially when dealing with a particular awkward or aggressive Inspector.

This course will dispel many myths about the internal operation of HMRC. It will focus on what HMRC can and cannot do but also deal with the practicalities of working and settling cases.

CONTENT

The course focuses on the practicalities of dealing with HMRC including:

- Understanding HMRC
- An overview of the legislation
- The selection of enquiry cases
- The new enquiry process, including information powers for records, examination, site visits, access to personal records, meetings, etc
- The new penalties regime
- Practical pointers and examples
- A brief look at the new review process & Tribunal system

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast*	19 May	09:30-12:30	Andrew Burgess
Birmingham	25 Feb	09:15-12:15	Mark Morton
	25 Feb	14:30-17:30	Mark Morton
Cambridge	8 Feb	15:00-18:00	Mark Morton
Derby	11 Feb	14:30-17:30	Mark Morton
Leicester	24 Feb	09:15-12:15	Mark Morton
	2 Mar	14:00-17:00	Mark Morton
Londonderry*	18 May	09:30-12:30	Andrew Burgess
Northampton	24 Feb	14:30-17:30	Mark Morton
	9 Mar	09:15-12:15	Mark Morton
Nottingham	11 Feb	09:15-12:15	Mark Morton
	8 Mar	14:00-17:00	Mark Morton
Peterborough	4 Mar	15:00-18:00	Mark Morton
West Bromwich	3 Mar	09:15-12:15	Mark Morton
	3 Mar	14:30-17:30	Mark Morton

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Finance Bill 2010

OBJECTIVES

This course will cover all of the major clauses in the Finance Bill and will concentrate on the practical implications for accountants and their clients.

CONTENT

Changes to:

- Personal tax
- Employee tax
- Capital taxes
- Business and corporate tax
- VAT
- Other legislative changes relevant to 2010/11 tax year

CPD HOURS: 3

Venue	Date	Time	Speaker
Bury St Edmunds	1 Jul	15:00-18:00	Mark Morton

£85 plus VAT per person

Season Ticket Option Available

Finance Act 2010

available on CD

OBJECTIVES

This course will cover all of the major clauses in the Finance Act and will concentrate on the practical implications for accountants and their clients.

CONTENT

Changes to:

- Personal tax
- Employee tax
- Capital taxes
- Business and corporate tax
- VAT
- Other legislative changes relevant to 2010/11 tax year

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	21 Sep	13:30-16:30	Mark Morton
Belfast*	9 Sep	09:30-12:30	Mark Morton
Billericay	6 Sep	14:00-17:15	Giles Mooney
Birmingham	13 Sep	09:15-12:15	Pat Nown
	13 Sep	14:30-17:30	Pat Nown
Bracknell	7 Oct	14:00-17:15	Phil Williams
Bristol	14 Sep	09:30-12:30	Mark Morton
	14 Sep	13:45-16:45	Mark Morton
Cambridge	9 Sep	15:00-18:00	Pat Nown
Derby	15 Sep	14:30-17:30	Andrew Burgess
Edinburgh	22 Sep	13:30-16:30	Mark Morton
Exeter	9 Sep	14:00-17:00	Norman Allison
Glasgow	20 Sep	13:30-16:30	Mark Morton
Gravesend	30 Sep	14:00-17:15	Phil Williams
Hatfield	8 Sep	14:00-17:15	Phil Williams
High Wycombe	21 Sep	09:30-12:45	Phil Williams
	21 Sep	14:00-17:15	Phil Williams
Ipswich	28 Sep	09:30-12:45	Phil Williams
	28 Sep	14:00-17:15	Phil Williams
Lancaster	14 Sep	14:00-17:00	Norman Allison
Leeds	7 Sep	14:00-17:15	Phil Williams
Leicester	14 Sep	09:15-12:15	Andrew Burgess
	14 Sep	14:00-17:00	Andrew Burgess
	22 Sep	09:15-12:15	Andrew Burgess
London	23 Sep	09:30-12:45	Phil Williams
	23 Sep	14:00-17:15	Phil Williams
Londonderry*	8 Sep	09:30-12:30	Mark Morton
Manchester	6 Sep	14:00-17:15	Phil Williams
Milton Keynes	14 Sep	14:00-17:15	Phil Williams
Newbury	13 Sep	14:00-17:15	Phil Williams
Newcastle	16 Sep	15:30-18:30	Phil Williams
Northampton	7 Sep	09:15-12:15	Pat Nown
	22 Sep	14:30-17:30	Andrew Burgess
Norwich	8 Sep	13:30-16:45	Giles Mooney
Nottingham	8 Sep	09:15-12:15	Pat Nown
	20 Sep	14:00-17:00	Pat Nown
Oxford	16 Sep	15:30-18:30	Norman Allison
	28 Sep	15:30-18:30	Norman Allison
Peterborough	20 Sep	15:00-18:00	Andrew Burgess
Southend-on-Sea	27 Sep	14:00-17:15	Phil Williams
Stirling	23 Sep	13:30-16:30	Mark Morton
Tunbridge Wells	6 Sep	14:00-17:15	Tim Good
Watford	20 Sep	14:00-17:15	Phil Williams
West Bromwich	21 Sep	09:15-12:15	Pat Nown
	21 Sep	14:30-17:30	Pat Nown
York	15 Sep	14:00-17:15	Phil Williams

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Incorporation v Non Incorporation

OBJECTIVES

The course will consider the alternative taxation implications on running a business through a company or as an unincorporated business. Ongoing factors affecting the operation of the business as well as the implications for the individual as owner, shareholder or director will be included.

CONTENT

- Tax considerations for the individual using alternative business mediums
- Taxation differences between companies and unincorporated businesses
- The incorporation process
- Small company taxation issues
- Efficient income extraction from a company
- Maximising capital gains tax reliefs
- Inheritance tax reliefs and considerations
- Disincorporation issues

CPD HOURS: 3

Venue	Date	Time	Speaker
Bury St Edmunds	13 May	15:00-18:00	Pat Nown
Exeter	28 Jun	14:00-17:00	Pat Nown
High Wycombe*	13 Oct	14:00-17:15	Pat Nown

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

Inheritance Tax Planning including Trusts

OBJECTIVES

Even in recessionary times IHT planning should remain a priority area of tax planning for clients. This course will remind participants of key planning areas and will focus on the use of trusts in both lifetime and will planning. It will cover key assets such as the family business and the family home.

CONTENT

The IHT regime for trusts

- Identifying relevant property
- Reminder of the rules on relevant property

Lifetime planning

- Use of PETs and exemptions
- Using trusts
- Gifts with reservation
- Dealing with business assets

Will planning

- Transferable nil rate band
- Tax effective will drafting

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast	19 May	13:45-16:45	Andrew Burgess
Londonderry	18 May	13:45-16:45	Andrew Burgess

£115 plus VAT per person

Season Ticket Option Available

Inheritance Tax Update

OBJECTIVES

Even in recessionary times IHT planning should remain a priority area of tax planning for clients. This course will remind participants of key planning areas and will focus on the use of trusts in both lifetime and Will planning. It will cover key assets such as the family business and the family home.

CONTENT

The IHT regime for trusts

- Identifying relevant property
- Reminder of the rules on relevant property

Lifetime planning

- Use of PETs and exemptions
- Using trusts
- Gifts with reservation
- Dealing with business assets

Will planning

- Transferable nil rate band
- Tax effective Will drafting

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	24 May	13:30-16:30	Andrew Burgess
Edinburgh	25 May	13:30-16:30	Andrew Burgess

£85 plus VAT per person

Season Ticket Option Available

Introduction to Stamp Duty & Stamp Duty Land Tax

OBJECTIVES

Stamp Duty Land Tax replaced Stamp Duty in relation to property transactions but the latter regime still exists in relation to share dealings and similar transactions.

This course will explain the basic principles underlying both the Stamp Duty and SDLT regimes and consider practical examples of the application of the principles. It will also include a review of some of the anti-avoidance provisions relating to both regimes and the pitfalls for the unwary.

CONTENT

- The basic principles of Stamp Duty and Stamp Duty Land Tax
- The administrative regime including interest and penalties
- Exempt transactions and reliefs including corporate transaction relief
- Partnerships
- Leases
- Stamp Duty Reserve Tax

CPD HOURS: 3

Venue	Date	Time	Speaker
Exeter	14 Jul	14:00-17:00	Ros Martin
Coventry	21 Jun	14:00-17:00	Ros Martin
London	7 Jun	14:00-17:00	Ros Martin

£110 plus VAT per person

NI Update

OBJECTIVES

This course is designed for accountants and employers who have an interest in social security related issues. Many employers fall foul of the different PAYE and NIC rules. Jim will highlight these differences and explain some of the planning ideas which arise out of these differences. There will be plenty of opportunity for questions both during and after the presentation and attendees are invited to take an active part in the discussions.

CONTENT

- The latest developments and where HMRC are showing an interest
- Company directors – loan accounts, loan write off, end of year adjustments
- The upper accrual point
- The position of entertainers, teachers and lecturers and other individuals treated as employees
- Employees with more than one job or who are employed or self employed including aggregation, deferment and refunds
- Salary sacrifice and the effects on SMP
- Termination payments
- Tips and gratuities
- State pension changes from 6 April 2010
- New personal account pension arrangements from 2012
- Voluntary contributions – Class 2 or Class 3
- International issues – revised EU social security rules, reciprocal agreements and employees going to or coming from non-agreement countries

CPD HOURS: 3

Venue	Date	Time	Speaker
Glasgow	23 Mar	09:30-12:30	Jim Yuill
London	25 Mar	14:00-17:00	Jim Yuill
Nottingham	16 Mar	14:00-17:00	Jim Yuill

£110 plus VAT
per person

PAYE and Benefits Update

OBJECTIVES

In recent years there have been numerous, important changes in tax and National Insurance legislation which affect the day to day operation of clients' businesses. This course will provide participants with a wide ranging, practical review of these recent developments in benefits in kind and National Insurance.

CONTENT

- A review of new developments
- A review of current compliance issues
- Benefit in kind problem areas
- Salary sacrifice and planning
- Travelling and subsistence
- Other topical issues

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	11 Mar	09:30-12:30	Mark Morton
High Wycombe	29 Apr	09:30-12:45	Mark Morton
Lancaster	10 Feb	14:00-17:00	Mark Morton
London	25 Mar	09:30-12:30	Mark Morton
Nottingham	16 Mar	09:30-12:30	Mark Morton

£110 plus VAT
per person

Planning to Retain the Wealth of the Elderly

OBJECTIVES

Advising the elderly on the financial implications of long-term care is a rapidly expanding area of Law and Finance. However, the expansion has brought with it added complications for the practitioner with the ongoing introduction of new legislation, changes in regulations, guidelines and case law. The aim of this course is to bring together recent changes that have taken place and offer practical and current advice on the common questions asked by clients and practitioners.

CONTENT

The course will cover the following issues:

- Setting the scene: an overview of funding long-term care and asset protection
- Professional issues: conflict of interest, financial health check, mental capacity, practitioners' duties, risk analysis, file management, IPFDA claims and avoiding negligence claims
- Financial assessments, the Notional Capital Rule and local authority recovery procedures
- Asset protection: immediate, medium and long term planning
- Asset protection: the options - Wills, trusts, leases, gifting assets, disregarded assets and asset preservation, investment and insurance schemes, personal possessions, sharing property with the elderly and equity release
- Options relating to the family home
- Complications with former local authority properties
- Protection of business assets
- Effective gifting
- Amendments to CRAG Guidelines [2007]
- Practical case studies

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast*	19 Apr	13:45-16:45	Jonathan Wilkey
Billericay	7 Oct	14:00-17:15	Jonathan Wilkey
High Wycombe	7 Dec	14:00-17:15	Jonathan Wilkey
London	14 Oct	14:00-17:15	Jonathan Wilkey
Norwich	1 Nov	13:30-16:45	Jonathan Wilkey
Oxford	3 Feb	15:30-18:30	Jonathan Wilkey
York	22 Nov	14:00-17:15	Jonathan Wilkey

* Alternative prices apply at these venues

£85 plus VAT
per person

Season Ticket
Option Available

Red Tape Round Up - Dealing with HMRC

OBJECTIVES

Following the creation of HMRC in 2005 there have been a number of significant changes in the administration of the UK tax system which affect taxpayers and advisers. The changes cover many of the basic areas of the tax system, such as the right to reclaim tax, the right of HMRC to obtain information and charge penalties and the procedures to enable disputes between taxpayers and HMRC to be settled. This course will look at the new powers and identify how practitioners can best use them and where appropriate counter them to protect their clients.

CONTENT

The course will include the following areas:

- Time limit changes
  - filing dates
  - dates for making claims
- HMRC information powers
  - to obtain information
  - to inspect business premises
- New penalty regime
  - the legal powers
  - the scope for negotiation
- Taxpayer right to obtain repayment
- The new procedure for dealing with disputes
  - HMRC review process
  - tribunal system
- Customer Charter
  - what it means in practice

CPD HOURS: 3

Venue	Date	Time	Speaker
Billericay	22 Feb	14:00-17:15	Andrew Burgess
Bracknell	11 May	09:30-12:45	Mark Morton
Gravesend	2 Mar	14:00-17:15	Andrew Burgess
High Wycombe	1 Mar	14:00-17:15	Andrew Burgess
Ipswich	9 Mar	09:30-12:45	Andrew Burgess
	9 Mar	14:00-17:15	Andrew Burgess
Leeds	17 Feb	14:00-17:15	Mark Morton
London	4 Mar	09:30-12:45	Andrew Burgess
	4 Mar	14:00-17:15	Andrew Burgess
Manchester	25 Feb	14:00-17:15	Andrew Burgess
Milton Keynes	16 Feb	14:00-17:15	Mark Morton
Newbury	3 Mar	14:00-17:15	Andrew Burgess
Newcastle	18 Feb	15:30-18:30	Mark Morton
Norwich	8 Mar	13:30-16:45	Andrew Burgess
Tunbridge Wells	8 Feb	14:00-17:15	Andrew Burgess
Watford	15 Feb	14:00-17:15	Mark Morton

£85 plus VAT per person — Season Ticket Option Available

Share Incentive Arrangements for the Smaller Company

OBJECTIVES

The course provides an understanding of current legislation on employee share schemes together with an interpretation of how the legislation can operate to the benefit of small to medium size private companies and their owner-director managers.

CONTENT

The course begins with an explanation of how to set up an employee share scheme. This is followed by an appreciation of the tax-approved employee and executive share schemes and how these schemes can offer significant tax advantages. Their operation with discretionary trust arrangements is also considered. Additionally, the course examines the merits of working with tax-unapproved schemes. In particular, the course explains how the Share Incentive Plan and Enterprise Management Incentives provide opportunities for the following:

- The motivation of senior management
- The involvement of employees as a whole
- The shareholder exit with deferral of capital gains tax
- The transfer/issue of shares to employees
- The growing company where there is potential for floatation
- The management buy-out.

CPD HOURS: 3

Venue	Date	Time	Speaker
Exeter	13 Oct	14:00-17:00	David Craddock

£85 plus VAT per person — Season Ticket Option Available

Tax Implications of Buying & Selling Private Companies

OBJECTIVES

This course looks at some of the important tax issues which need to be considered when advising clients on buying or selling private companies. The significance of the revised CGT regime will be examined in some detail.

CONTENT

- Sale of shares v Sale of assets
- CGT and private company shareholders after 5 April 2008
- Tax planning for vendors and purchasers.

CPD HOURS: 3

Venue	Date	Time	Speaker
Bury St Edmunds	16 Nov	15:00-18:00	Robert Jamieson

£85 plus VAT per person — Season Ticket Option Available

Tax Implications of Marriage, Cohabitation, Separation and Divorce

available on CD

OBJECTIVES

Then tax regime in general still treats married couples and cohabiting couples in different ways. This course will consider the tax position of each type of couple in a variety of situations. It will consider planning and pitfalls.

CONTENT

- Creating the relationship
- Residence and domicile issues
- Basic income tax issues
- Running a business together
- Capital tax issues
- Relationship breakdown – income issues
- Relationship breakdown – capital tax issues

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	22 Apr	09:15-12:15	Andrew Burgess
	22 Apr	14:30-17:30	Andrew Burgess
Cambridge	12 Apr	15:00-18:00	Andrew Burgess
Derby	31 Mar	14:30-17:30	Andrew Burgess
Glasgow	28 Oct	13:30-16:30	Andrew Burgess
Leicester	11 Mar	14:00-17:00	Andrew Burgess
	14 Apr	09:15-12:15	Andrew Burgess
Northampton	17 Mar	09:15-12:15	Andrew Burgess
	14 Apr	14:30-17:30	Andrew Burgess
Nottingham	18 Mar	14:00-17:00	Andrew Burgess
	20 Apr	09:15-12:15	Andrew Burgess
Peterborough	29 Mar	15:00-18:00	Andrew Burgess
West Bromwich	15 Apr	09:15-12:15	Andrew Burgess
	15 Apr	14:30-17:30	Andrew Burgess

£85 plus VAT per person — Season Ticket Option Available

Tax Planning for Family Companies

available on CD

OBJECTIVES

The course provides a review of the tax planning ideas and problem areas for family companies.

CONTENT

The course will deal with the tax implications of:

- Extracting profits from a family company - current issues
- Incorporation issues
- Multi-business activities
- Ensuring CGT Entrepreneurs' Relief and IHT business property relief is available
- Exit route planning
- Passing on the family business

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast*	9 Sep	13:45-16:45	Mark Morton
Birmingham	15 Jun	09:15-12:15	Phil Williams
	15 Jun	14:30-17:30	Phil Williams
Cambridge	16 Jun	15:00-18:00	Phil Williams
Derby	8 Jun	14:30-17:30	Phil Williams
Leicester	19 May	14:00-17:00	Phil Williams
	9 Jun	09:15-12:15	Phil Williams
Londonderry*	8 Sep	13:45-16:45	Mark Morton
Northampton	26 May	09:15-12:15	Phil Williams
	29 Jun	14:30-17:30	Phil Williams
Nottingham	8 Jun	09:15-12:15	Phil Williams
	23 Jun	14:00-17:00	Phil Williams
Peterborough	24 Jun	15:00-18:00	Phil Williams
West Bromwich	30 Jun	09:15-12:15	Phil Williams
	30 Jun	14:30-17:30	Phil Williams

* Alternative prices apply at these venues

£85 plus VAT per person — Season Ticket Option Available

Taxation of Property Transactions

OBJECTIVES

Transactions involving property will usually have a number of direct tax implications which the advisor must consider. Some of these areas are well established, but some, like Stamp Duty Land Tax, are very new.

This course will cover the main direct tax issues which need to be considered in advising clients who may become involved in property transactions.

CONTENT

- An introduction to Stamp Duty Land Tax
- Property development
  - The risks of being taxed as a trader
  - Artificial transactions in land
  - Pros and cons of different entities for property development
- Property for use in business
  - Capital tax issues
- Leases
  - A reminder of the treatment for income tax and CGT
- IHT and the family home

CPD HOURS: 3

Venue	Date	Time	Speaker
Lancaster	19 Oct	14:00-17:00	Andrew Burgess

£85 plus VAT per person — Season Ticket Option Available

Tax Update

OBJECTIVES

This course will bring you up to date with recent changes in tax legislation and practice. In particular attention will be paid to the practical implications of the changes, identifying appropriate advice for clients.

CONTENT

- Changes in the law and Inland Revenue interpretations
- Personal and corporate tax planning points
- PAYE and NIC changes
- VAT developments

CPD HOURS: 3

Venue	Date	Time	Speaker
Bracknell	13 Apr	09:30-12:45	Andrew Burgess
Bury St Edmunds	29 Nov	15:00-18:00	Andrew Burgess
High Wycombe	26 May	09:30-12:45	Bob Trunchion
	13 Jul	14:00-17:15	Mark Morton
	25 Oct	09:30-12:45	Dean Wootten
	25 Oct	14:00-17:15	Dean Wootten
Oxford	8 Jun	15:30-18:30	Mark Morton
	23 Jun	15:30-18:30	Mark Morton

£85 plus VAT per person

Season Ticket Option Available

Topical Tax Issues

available on CD

OBJECTIVES

The course will aim to make participants aware of developments in direct taxation over the last six to twelve months that affect the advice that should be given to clients.

CONTENT

The precise content of this course cannot be established at the time of going to print but will include HMRC statements, recent tax cases, points of practice as well as changes in legislation.

Further details will be available from Mercia on request nearer the time of the course.

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	24 Nov	13:30-16:30	Pat Nown
Belfast*	24 Nov	09:30-12:30	Norman Allison
Billericay	16 Nov	14:00-17:15	Mark Morton
Birmingham	1 Dec	09:15-12:15	Mark Morton
	1 Dec	14:30-17:30	Mark Morton
Bristol	10 Feb	09:30-12:30	Norman Allison
	10 Feb	13:45-16:45	Norman Allison
Cambridge	18 Nov	15:00-18:00	Mark Morton
Derby	15 Nov	14:30-17:30	Phil Williams
Edinburgh	25 Nov	13:30-16:30	Pat Nown
Exeter	4 Feb	14:00-17:00	Phil Williams
Glasgow	23 Nov	13:30-16:30	Pat Nown
Gravesend	8 Nov	14:00-17:15	Mark Morton
Hatfield	7 Dec	14:00-17:15	Pat Nown
High Wycombe	17 Nov	14:00-17:15	Andrew Burgess
Ipswich	9 Nov	09:30-12:45	Pat Nown
	9 Nov	14:00-17:15	Pat Nown
Lancaster	30 Nov	14:00-17:00	Pat Nown
Leeds	10 Nov	14:00-17:15	Mark Morton
Leicester	16 Nov	09:15-12:15	Phil Williams
	7 Dec	09:15-12:15	Phil Williams
	7 Dec	14:00-17:00	Phil Williams
London	11 Nov	09:30-12:45	Mark Morton
	11 Nov	14:00-17:15	Mark Morton
Londonderry*	23 Nov	09:30-12:30	Norman Allison
Manchester	8 Dec	14:00-17:15	Mark Morton
Milton Keynes	16 Nov	14:00-17:15	Pat Nown
Newbury	6 Dec	14:00-17:15	Pat Nown
Newcastle	18 Nov	15:30-18:30	Pat Nown
Northampton	16 Nov	14:30-17:30	Phil Williams
	6 Dec	14:30-17:30	Mark Morton
Norwich	15 Nov	13:30-16:45	Mark Morton
Nottingham	17 Nov	14:00-17:00	Phil Williams
	22 Nov	14:00-17:00	Mark Morton
Oxford	2 Dec	15:30-18:30	Pat Nown
	9 Dec	15:30-18:30	Pat Nown
Peterborough	29 Nov	15:00-18:00	Phil Williams
Southend-on-Sea	14 Dec	14:00-17:15	Pat Nown
Stirling	22 Nov	13:30-16:30	Pat Nown
Tunbridge Wells	13 Dec	14:00-17:15	Pat Nown
Watford	9 Dec	14:00-17:15	Mark Morton
West Bromwich	23 Nov	09:15-12:15	Mark Morton
	23 Nov	14:30-17:30	Mark Morton
York	17 Nov	14:00-17:15	Pat Nown

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

UK Tax Issues for Non Domiciled Individuals

OBJECTIVES

The sweeping changes to the remittance basis of taxation in the Finance Act 2008 have focussed attention on the tax position of non-domiciled individuals in the UK. This course will consider in detail all the direct tax issues facing this group.

CONTENTS

What is domicile?

- Domicile of origin
- Domicile of choice
- Domicile of dependence
- Deemed domicile

Remittance basis

- Claiming the remittance basis
- Remittance basis charge
- Identifying remittances
- What constitutes a remittance
- Dealing with mixed funds

Specific issues on types of income and capital gains

IHT and the non domiciled

- Excluded property trusts

Offshore trusts and the non domiciled

- Income tax issues
- CGT issues

CPD HOURS: 3

Venue	Date	Time	Speaker
Oxford	27 May	15:30-18:30	Andrew Burgess

£85 plus VAT per person

Season Ticket Option Available

Use of Trusts for Tax Planning

OBJECTIVES

Trusts are a long-established vehicle for capital tax planning and although FA 2006 removed the use of some types of trust they remain useful tools for the tax planner. This course will provide a reminder of how trusts operate and they key planning roles that they can fulfil.

CONTENT

Basic issues on trusts

- Identification of key participants
- Types of trust
- Basic drafting issues

Relevant property

- Identifying which trusts are relevant property
- Basic IHT rules on relevant property

Using trusts in lifetime planning

- General gifts of assets
- Family company shares
- Inter-action with Entrepreneurs' Relief
- Family home

Use in will planning

- Types of trust which can be used
- Implications legatees

CPD HOURS: 3

Venue	Date	Time	Speaker
Bristol	19 Apr	13:45-16:45	Andrew Burgess
Oxford	18 Oct	15:30-18:30	Andrew Burgess

£85 plus VAT per person

Season Ticket Option Available

Utilising Tax Losses - Corporate and Personal

OBJECTIVES

Since the Labour Government was formed in 1997, there has been a steady sequence of changes to the loss regime affecting traders of all sorts as well as those conducting other activities. These have culminated in the FA 2009 provisions reintroducing a temporary carry back extension to three years.

This course will refresh and update the options for loss relief and will consider how to determine the optimal claims and reliefs.

CONTENT

- Income tax trades: established businesses
- Income tax trades: opening and closing years
- Carry forward of unrelieved losses
- Partnerships, including LLPs
- Relief for trading losses against chargeable gains
- CGT normal rules
- Company trading losses
- Carry forward of losses
- Commencement and cessation of trade
- Non-trading losses, including those arising from property businesses
- Group and consortium relief

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	22 Mar	13:30-16:30	Mark Ward
Glasgow	23 Mar	13:30-16:30	Mark Ward
Sudbury	9 Feb	15:00-18:00	Martyn Ingles

£85 plus VAT per person

Season Ticket Option Available

VAT: Cross Border Trading

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 explain the changes to the rules taking place on 1 January 2010.

CONTENT

- The extent of the EC
- Imports and exports
- Acquisitions and EC sales
- Place of supply of services
- The 1 January 2010 changes in detail
- Invoicing requirements
- The reverse charge
- Buying in services from overseas suppliers
- Overseas VAT recovery
- Overseas registration issues
- When to charge VAT to overseas customers

WHO SHOULD ATTEND

All partners and senior members of staff involved in or advising on international transactions in goods and/or services.

CPD HOURS: 3

Venue	Date	Time	Speaker
Coventry	3 Mar	14:00-17:00	Neil Owen
London	4 Feb	14:00-17:00	Neil Owen

£110 plus VAT per person

VAT Update and Problem Areas

available on CD

OBJECTIVES

VAT is the fastest changing and most complex tax that practitioners have to deal with on a regular basis. This course will bring you up to date with the most significant changes in the last 12 months and explain the likely impact of those changes on businesses.

CONTENT

- Basic land and property transactions
- Partial exemption
- Capital Goods Scheme
- International trading in goods and services
- Recent developments

Case studies may be used during the session to help illustrate the topics where appropriate.

CPD HOURS: 3 (Audit Related: 1)

Venue	Date	Time	Speaker
Aberdeen	29 Jun	13:30-16:30	Neil Owen
Belfast*	24 Nov	13:45-16:45	Simone Hurst
Billericay	2 Dec	14:00-17:15	Dean Wootten
Birmingham	15 Nov	14:30-17:30	Neil Owen
Bracknell	9 Nov	14:00-17:15	Dean Wootten
Bury St Edmunds	19 Apr	15:00-18:00	Simone Hurst
Cambridge	4 Oct	15:00-18:00	Neil Owen
Derby	2 Dec	14:30-17:30	Neil Owen
Edinburgh	22 Jun	13:30-16:30	Neil Owen
Exeter	20 Apr	14:00-17:00	Simone Hurst
Glasgow	23 Jun	13:30-16:30	Neil Owen
Gravesend	23 Nov	14:00-17:15	Dean Wootten
Hatfield	11 Nov	14:00-17:15	Dean Wootten
High Wycombe	13 Dec	14:00-17:15	Neil Owen
Ipswich	8 Dec	09:30-12:45	Dean Wootten
	8 Dec	14:00-17:15	Dean Wootten
Lancaster	27 Apr	14:00 - 17:00	Simone Hurst
Leeds	24 Nov	14:00-17:15	Dean Wootten
Leicester	11 Oct	14:00-17:00	Neil Owen
	24 Nov	14:00-17:00	Neil Owen
London	14 Dec	09:30-12:45	Dean Wootten
	14 Dec	14:00-17:15	Dean Wootten
Londonderry*	23 Nov	13:45-16:45	Simone Hurst
Manchester	25 Nov	14:00-17:15	Dean Wootten
Milton Keynes	29 Nov	14:00-17:15	Dean Wootten
Newbury	17 Jun	14:00-17:15	Dean Wootten
Newcastle	9 Dec	15:30-18:30	Neil Owen
Northampton	13 Oct	14:30-17:30	Neil Owen
	23 Nov	14:30-17:30	Neil Owen
Norwich	7 Dec	13:30-16:45	Dean Wootten
Nottingham	27 Oct	14:00-17:00	Neil Owen
	30 Nov	14:00-17:00	Neil Owen
Peterborough	11 Nov	15:00-18:00	Neil Owen
Southend-on-Sea	30 Nov	14:00-17:15	Dean Wootten
Tunbridge Wells	22 Nov	14:00-17:15	Dean Wootten
Watford	8 Nov	14:00-17:15	Dean Wootten
West Bromwich	20 Oct	09:15-12:15	Neil Owen
	20 Oct	14:30-17:30	Neil Owen
York	8 Dec	14:00-17:15	Neil Owen

* Alternative prices apply at these venues

£85 plus VAT per person

Season Ticket Option Available

VAT: Land and Property

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 building contractors and those applicable to developers, as well as to others owning an interest in property.

CONTENT

- Zero-rated new construction work
- Reduced-rated building conversions
- Rental of new dwellings built for sale
- Holiday homes
- Non-exempt property transactions
- Work to listed buildings
- The option to tax in detail
- Sale and purchase of let property

CPD HOURS: 3

Venue	Date	Time	Speaker
High Wycombe	16 Feb	14:00-17:15	Neil Owen

£110 plus VAT per person

Delivering Quality Client Service

OBJECTIVES

To enable participants to:

- Develop the key skills and disciples required in managing client relationships effectively
- Deliver a consistent, high quality service to their clients

CONTENT

- Managing client expectations
- Setting service standards and managing the service process
- Developing and building relationships
- Recognising that behaviour breeds behaviour; using attitude and non verbal communication to best effect
- Handing areas of difficulty
- Making the most of client meetings
- Client needs and service opportunities

CPD HOURS : 3

Venue	Date	Time	Speaker
Lancaster	2 Dec	14:00 - 17:00	Andy Whittaker

£85 plus VAT per person

Season Ticket Option Available

Improving Personal Productivity and Effectiveness

OBJECTIVES

The course will aim to give participants a greater understanding of the principles of effective time and task management and personal productivity. It will provide the tools to enable participants to be better organised and to be more efficient in their working day.

CONTENT

- Time and your mindset
  - analysing your time, the time wasters and changing your mindset
  - symptoms of a disorganised person
- Communication and productivity
  - effective communication
- Organising, planning and prioritising
  - core principles
  - short and longer term planning
  - structuring your day
  - goal setting
- Building personal productivity skills
  - using your energy cycles effectively
  - effective decision making
  - overcoming distraction and interruptions

CPD HOURS: 3

Venue	Date	Time	Speaker
Billericay	8 Jul	14:00-17:15	John Sharkey
Bristol	11 Nov	13:45-16:45	John Sharkey
High Wycombe	6 Jul	14:00-17:15	John Sharkey
London	29 Jun	14:00-17:15	John Sharkey
York	24 Jun	14:00-17:15	John Sharkey

£85 plus VAT per person

Season Ticket Option Available

Sage 50 Accounts: Data Extraction Using Excel

OBJECTIVES

To provide hands-on training on some of the more advanced concepts of exporting Sage 50 data into Excel, and using Excel tools to interrogate this data.

Some of the more advanced Excel features, such as the database, pivot tables and ODBC links will be covered, to enable participants to feel confident with interrogating and extracting Sage data.

CONTENT

- Export Sage 50 data to Excel
- Using the Sage 50 report designer to change sort orders and adding filters
- Using Sage filters and search options
- Export data directly to Excel
- Export to Excel via .csv
- Excel Database - Autofilter and Advanced Filter
- Excel Pivot Tables
- Creating Excel ODBC links to Sage 50 data and using MS-Query

CPD HOURS: 3 (Audit Related: 3)

NUMBERS LIMITED TO 12

Venue	Date	Time	Speaker
Birmingham	15 Apr	14:00-17:00	Mike Rees
London	17 Mar	14:00-17:00	Mike Rees
Nottingham	23 Mar	14:00-17:00	Mike Rees

£110 plus VAT
per person

Sage 50 Payroll: Update for Existing Users

OBJECTIVES

To provide hands-on training on the latest version of Sage 50 Payroll. To assist staff in their understanding of the more technical aspects of the software, in order to improve productivity and understanding. The course is also useful for those who need to go through the Sage payroll year-end procedures for the first time.

CONTENT

- Organising the Payroll desktop
- Maintenance and Housekeeping utilities
- Accessing Historical data
- Rollback wizard
- Manually reconciling year-end reports
- Sage 50 Payroll year-end and post year-end update procedures
- Import and Export Payroll data
- Exporting Nominal Journals
- Introduction to Payroll Report Designer

CPD HOURS: 3

NUMBERS LIMITED TO 12

Venue	Date	Time	Speaker
Birmingham	15 Apr	09:30-12:30	Mike Rees
London	17 Mar	09:30-12:30	Mike Rees
Nottingham	23 Mar	09:30-12:30	Mike Rees
Stirling	2 Feb	13.30-16.30	Mike Rees

£110 plus VAT
per person

Tax Specialist Courses

For tax specialists who want a detailed review of complex topics these courses provide participants with the opportunity to listen to and question speakers who are recognised as experts in their field.

Each topic has been given a full half day to enable the speakers to look in detail at what they believe to be the most relevant areas and to share their views and experiences.

Where two courses are held on the same day both courses can be attended at the cost of £295 plus VAT per person including lunch.

If you would like to discuss the content of any particular course or are interested in organising an in house course please contact Kay Sanders at kay.sanders@mercia-group.co.uk or call her on 0116 258 1200.

Tax Cases Update

OBJECTIVES

In this session Timothy will update the tax professional on recent cases, giving an in depth view from the Bar on the implications of these cases.

CONTENT

The content will only be decided shortly before the course as it will cover the most topical cases. The main areas of direct tax will be covered.

CPD HOURS: 3

Venue	Date	Time	Speaker
London	16 Mar	09:30-12:30	Timothy Lyons

Venue details provided with booking confirmation

£185 plus VAT per person

Employee Share Trusts and Employee Benefit Trusts

OBJECTIVES

This course is designed to acquaint the audience in a very practical way with the subtleties and sophistications of how employee share trusts and employee benefit trusts operate on a commercial basis, including an explanation of how companies can use these mechanisms to extract funds.

CONTENT

The specific subject areas that are addressed are as follows:

- The operation of the trust
- The employer's responsibilities in operating the trust
- The setting-up of the trust
- The long-term incentive plan, basic and advanced
- The tax issues for the trust established by a close company
- The extraction of company funds
- The use of the trust in management buy-outs
- The corporation tax deduction, including deferred tax credits
- The market for the shares and pay-as-you-earn
- The origins of the trust concept

CPD HOURS: 3

Venue	Date	Time	Speaker
London	16 Mar	13:30-16:30	David Craddock

Venue details provided with booking confirmation

£185 plus VAT
per person

Employment Tax and HMRC's Compliance Regime

OBJECTIVES

In this session Andrew will look at some of the most topical and problematic areas which can occur in the area of employment tax. This will include a review of the new developments with HMRC's Interventions as well as current issues when considering employment status for tax purposes.

CONTENT

- HMRC interventions - new developments
- Current contentious issues in employment taxation
- Recent cases
- Employment status - current issues

CPD HOURS: 3

Venue	Date	Time	Speaker
London	15 Apr	13:30-16:30	Andrew Gotch

Venue details provided with booking confirmation

£185 plus VAT
per person

Tax Issues for Distressed and Insolvent Companies

OBJECTIVES

The economy is in free fall and with each passing day there are further announcements of companies becoming insolvent.

This seminar looks at the different types of insolvency procedures and how they are taxed. Indeed the tax implications may well determine which is the better option.

CONTENT

- Setting the scene - an outline of the different insolvency procedures
- The taxation of administrations
  - The administrator as proper officer of the company
- The taxation of liquidations and administrative receiverships
- Miscellaneous issues
  - Debt and loan relationships
  - Section 94 debts
  - Foreign aspects
  - Limited Liability Partnerships
  - Current developments

CPD HOURS: 3

Venue	Date	Time	Speaker
London	11 May	09:30-12:30	Philip Ridgway

Venue details provided with booking confirmation

£185 plus VAT
per person

Advanced Tax Aspects of Reorganising the Family Company/ Group

OBJECTIVES

In this session Philip will look at application of the Substantial Shareholding Exemption both in the context of the s110, IA 1986 reorganisation and the s213, ICTA 1988 demerger and also in preparatory intra group reorganisations.

He will also look at the availability of Business Property Relief for inheritance tax and the availability of Entrepreneurs' Relief for capital gains tax. Other areas to be covered are corporate debt, the transfer of intangibles and SDLT and Stamp Duty.

CONTENT

The following issues will be covered in the context of a section 110 reorganisation and a section 213 demerger of family companies/ groups:

- Substantial shareholding exemption: when it applies, when it doesn't
- Intra-group reorganisations
- IHT Business Property Relief
- CGT Entrepreneurs' Relief
- Dealing with intra-group debt
- Transferring intangibles
- SDLT and Stamp Duty

CPD HOURS: 3

Venue	Date	Time	Speaker
London	11 May	13.30-16.30	Philip Ridgway

Venue details provided with booking confirmation

£185 plus VAT
per person

Property Tax in a Tough Climate

OBJECTIVES

Michael will consider some of the issues particularly relevant when dealing with property in today's economic climate.

CONTENT

Direct tax

- Update
- Use of LLPs and partnerships

SDLT

- Update
- HMRC challenges
- SDLT and partnerships

VAT

- Update
- Recent cases
- Transfer of a going concern
- Bad debt relief

CPD HOURS: 3

Venue	Date	Time	Speaker
London	24 Jun	9.30-12.30	Michael Thomas

Venue details provided with booking confirmation

£185 plus VAT
per person

UK Tax Residence and Non Domicile Issues

OBJECTIVES

With many important changes taking place in the area of Residence and Domicile, it is important to have a good understanding of the current issues for clients affected by the rules.

CONTENT

Laurent will look at these in detail covering:

- HMRC6 and residence
- Recent case law on residence
- An overview of the concept of domicile, including some of the difficult points
- HMRC6 and domicile
- Remittance planning
- Domicile and IHT including DTAs

CPD HOURS: 3

Venue	Date	Time	Speaker
London	24 Jun	13.30-16.30	Laurent Sykes

Venue details provided with booking confirmation

£185 plus VAT
per person

Personal, Management and Business Development Skills Courses

We have recognised for some time that personal, management and business development skills have become more important to the successful independent professional firm and we are now established as one of the leading providers of management training to the profession. We help firms to equip their staff with the management, business development and personal skills they need to cope with today's competitive, increasingly commercial and rapidly changing profession. Our aim is to develop such skills within a focussed, commercial and totally relevant context.

If you would like to discuss the content of any particular course or are interested in organising an in house course please contact John Sharkey at john.sharkey@mercia-group.co.uk or call him on 0116 258 1200.

Appraising and Developing Your People

OBJECTIVES

With the changes in CPD requirements, firms' appraisal systems are, once again, under the spotlight. Some systems have remained routine, bureaucratic, compliance-led exercises. Others have evolved and are an integral part of firms' performance management processes, motivating and developing their people.

As a result of this course, participants will be able to identify practical steps they can take to develop their individual effectiveness in conducting appraisals and improve the effectiveness of the appraisal process across their firm.

CONTENT

- What is your appraisal system seeking to achieve?
- Identifying the barriers to achieving those aims - individual and firm-wide
- Overcoming the barriers
- Assessing and monitoring performance
- Delivering effective feedback
- Refresher of the inter-personal skills
- Effective questioning and listening
- Establishing training and development needs
- Effective action planning
- Setting clear objectives

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	16 Mar	09:30-12:30	John Sharkey

Venue details provided with booking confirmation

£185 plus VAT per person

Client Care for Support Staff

OBJECTIVES

To enable PAs, secretaries and support staff to:

- Have a clear understanding of the key skills, disciplines and behaviours involved in keeping clients happy
- Reinforce participants' awareness of the importance of keeping clients happy in today's increasingly competitive and service orientated marketplace
- Provide the firm's clients with a disciplined, professional approach when dealing with them

CONTENT

- What keeps clients happy?
- Who are our clients – internal v external customers?
- Projecting the right image - identifying your firm's blind spots
- Effective communication - dealing with difficult situations in a professional manner
- Handling complaints
- Professional telephone techniques

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	24 Nov	14:00-17:00	Sally Hutchings

Venue details provided with booking confirmation

£185 plus VAT per person

Delivering Quality Client Service

OBJECTIVES

To enable participants to:

- Develop the key skills and disciplines required in managing client relationships effectively
- Deliver a consistent, high quality service to their clients

CONTENT

- Managing client expectations
- Setting service standards and managing the service process
- Developing and building relationships
- Recognising that behaviour breeds behaviour; using attitude and non-verbal communication to best effect
- Handling areas of difficulty
- Making the most of client meetings
- Client needs and service opportunities

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	24 Nov	09:30-12:30	Sally Hutchings

Venue details provided with booking confirmation

£185 plus VAT per person

Developing Personal Resilience

OBJECTIVES

To enable participants to develop the psychological and mental edge that will enable them to:

- Generally cope better with the many demands that are placed on each of them as individual 'business performers' in areas such as target achievement, task management, negotiation, competition, people management, self development, and lifestyle balance
- Be more consistent and more capable than their competitors in remaining determined, focused, confident, and 'in control' under pressure
- Build the above skills both for the purposes of individual development, and as contributors towards the efficiencies and resilience of a high performing team

CONTENT

What is personal resilience?

- Definitions and personal context
- The competitive edge

How we view barriers

- Current/historical business challenges

The core elements of personal resilience

- Overview of the four core elements of personally resilient performances - self belief, motivation, focus and handling pressure
- Understanding how to build and utilise this powerful psychological 'tool' in our business lives

The effects of pressure and stress

- Stress coping model
- Adjusting our 'thinking'
- Stress and pressure coping strategies

CPD HOURS: 6

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	20 Oct	09:30-17:00	Andrew Whittaker

Venue details provided with booking confirmation

£295 plus VAT per person

Effective Networking Skills

OBJECTIVES

To enable participants to:

- Be aware of what networking is, the variety of different ways it can be done and to be opportunistic in their day to day business dealings
- Prepare for both day to day opportunities and attendance at formal events
- Build their confidence in their own ability when in a networking situation and be able to 'stand out' and be the supplier of choice for more prospects

CONTENT

Networking principles

- What is networking?
- Great reasons to network
- The best places to network
- General day to day preparedness
- Developing opportunism

Formal events - getting prepared

- Setting your networking goals properly
- Your networking toolkit
- Great questions to ask

Formal events - when you are there

- On arrival
- Introducing yourself to strangers or groups
- Making a great first impression and building rapport
- Making small talk and remembering names
- Bringing others in, building your influence
- Working the room
- Networking gaffes - what not to do

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	16 Mar	14:00-17:00	John Sharkey

Venue details provided with booking confirmation

£185 plus VAT per person

Handling Difficult Situations

OBJECTIVES

To enable participants to:

- Overcome the day-to-day barriers to communication at work
- Use effective communication to build relationships with colleagues and clients
- Enhance their confidence and capabilities at getting their message across in a variety of difficult situations

CONTENT

- Identifying and overcoming the barriers to effective communication
- Inform, instruct and influence – choosing the right approach
- Confidence and self projection
- Developing the key skills
- Assertiveness and handling difficult situations
- Developing and building relationships with clients and colleagues
- Presenting your case

CPD HOURS: 6

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	22 Jun	09:30-17:00	Sally Hutchings

Venue details provided with booking confirmation

£295 plus VAT per person

Motivational Leadership and Team Development

OBJECTIVES

To enable participants to:

- Understand the differences between leadership and management
- Understand and develop the skills and behavioural elements of leadership such that these can be applied easily in the workplace
- Develop their ability to inspire others into action
- Understand the dynamics of teams and their development

CONTENT

Leadership principles

- Why strong leadership is such a powerful competitive advantage
- Leadership and management and the influence power spectrum
- The three accountabilities of a leader

Leadership skills, actions and behaviours

- What do leaders actually do?
- What leaders are seen to be doing
- Developing your leadership skills
- Inspiring others to want to work for you

Team dynamics and development

- What are teams?
- Building a team and its effectiveness
- Cross team relationships

CPD HOURS: 6

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	15 Apr	09:30-17:00	John Sharkey

Venue details provided with booking confirmation

£295 plus VAT per person

Turning Prospects Into Clients

OBJECTIVES

To enable participants to:

- Build their awareness and skills in the formation of strong personal business relationships
- Develop their influencing capability in a variety of situations such that they are the obvious choice of provider for any prospective client
- To develop their technical ‘selling’ ability when meeting with a prospect or current client and their ability to confidently manage the meeting process

CONTENT

Developing personal influencing

- What are your clients and prospects buying?
- The three influencing dimensions and how to use them effectively
- Developing your influencing skills
- The real you and how to ‘flex’ your approach to others

Professional selling skills

- The sales process
- Understanding the client’s or prospect’s needs and wants
- Making an impactful business proposal
- Overcoming prospect objections
- Gaining agreement to your proposal
- When and when not to negotiate

CPD HOURS: 6

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	4 May	09:30-17:00	Andrew Whittaker

Venue details provided with booking confirmation

£295 plus VAT per person

The People Manager’s Toolkit

OBJECTIVES

To enable participants to:

- Appreciate the personal ‘toolkit’ that all managers and leaders need to inspire, manage and develop staff effectively
- Begin developing these skills in themselves so they can apply them effectively in the workplace

CONTENT

Management style

- What’s my natural style?
- Day to day management scenarios and challenges
- Leading by example

Motivating staff

- Motivation principles
- Motivation self analysis
- Understanding your staff
- Building your inspirational ability

Delegation and briefings

- Briefing others - best practice
- What is delegation?
- How to delegate effectively
- The best questions to ask after briefing or delegating to others

Coaching and feedback

- Effective coaching behaviour
- Giving and receiving feedback

Managing effective meetings

CPD HOURS: 6

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	15 Sep	09:30-17:00	John Sharkey

Venue details provided with booking confirmation

£295 plus VAT per person

Professional Development Courses

There are three good reasons why you should commit to training all of your staff!

- New starters will be immediately effective in the office
- ‘On the job’ training time is kept to a minimum
- Senior staff can concentrate on chargeable work

Our Professional Development courses are designed to teach the basic principles of business advisory, accounting, auditing, taxation, IT and personal skills as required in a professional office and to develop these skills as more experience is gained.

The courses start with a basic introduction for staff with little or no prior knowledge of the subject. However this does not mean they are only suitable for those who are ‘new’ to the profession. For example, Sage 50: Set Up and Processing Cycles may be relevant to someone who has been in the profession 15 years but has never used Sage. Equally, it may be relevant for someone who has recently joined the profession.

These courses are also designed to extend participants’ existing knowledge with the level of assumed knowledge varying from course to course (see course outlines for the detail). Case studies and discussion exercises used on these courses will ensure participants have the opportunity to practice the new skills they are taught. To achieve this objective we limit the number of participants to ensure the necessary low participant to tutor ratio. The performance of all staff attending these courses is monitored and a brief report submitted to the training partner.

If you would like to discuss the content of any particular course or the suitability for a particular member of staff please call Liz Coates, John Sharkey or Kay Sanders on 0116 258 1200.

Advising the Client: Laws & Regulations

WHO SHOULD ATTEND

As business advisers we should be familiar with a wide range of laws and regulations.

This course is designed as an introduction to this area and is designed for staff who are undertaking practical accounts/audit work and are therefore in a position to spot assurance opportunities during the course of this work.

It is not designed for senior people with a high level of existing knowledge and is unlikely to be of benefit to anyone who has previously attended the CPD course ‘Laws and Regulations’.

OBJECTIVES

ISA+ 250 requires auditors to consider the implications of compliance with Laws and Regulations by an entity and to consider the action they should take when suspected non-compliance is found.

Additionally, the role of business adviser demands that the ‘modern accountant’ is aware of such issues that may affect the client and may possibly present an opportunity for the firm to sell additional services.

This course covers both these aspects and will ensure that audit/accounts staff are fully aware of the role they have to play.

CONTENT

The course will comprise of a mixture of formal lecturing and practical case studies incorporating role play. Specific issues which will be addressed are:-

Auditing standards - what are the specific requirements and what should be recorded on file to demonstrate compliance?

Business advisory role – an overview of key areas such as Employment Law, Health & Safety Data Protection.

CPD HOURS: 6

Venue	Date	Time
Oxford	12 Oct	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

Practical Business Issues

WHO SHOULD ATTEND

Participants will need to have a good grasp of taxation and accounting issues as there will be little formal lecturing. They should also have an awareness of dealing with all aspects of clients' affairs.

Participants should have at least 36 months practical experience as there is a need for a basic commercial awareness and understanding of the role that a business advisor undertakes. They should be starting to manage their own portfolio of clients. This course is not suitable for partners or senior managers with extensive experience of managing client portfolios.

OBJECTIVES

The aims of the course are to promote awareness of the practical issues encountered when running a business, many tax related, and to provide a basis from which you can help clients to make business decisions and resolve problems.

The material comprises a case study which includes computational and discursive exercises and participants will be expected to contribute towards group discussions, role plays and presentations.

CONTENT

Case studies to include the following elements:

- Incorporation vs non incorporation
- Laws and regulations
- Financing
- Staff issues
- Extraction of funds
- VAT
- Disincorporation/disposal

Participants will be expected to have a basic understanding of the main tax rules.

CPD HOURS: 6

Venue	Date	Time
Birmingham	30 Apr & 21 May & 1 Oct	09:30-17:00
Leicester	20 May & 11 Jun	09:30-17:00
Nottingham	24 Feb & 14 Oct	09:30-17:00
Peterborough	16 Apr	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

Accounts Finalisation and Interviewing Skills

WHO SHOULD ATTEND

The course is essential for anyone new to accounts finalisation and client interviews. It gives the opportunity to see what real life is like!

The relevance of the course will depend upon the participants' level of experience in this area. For most members of staff this course can usually be completed after 9 to 24 months in the profession.

OBJECTIVES

At the end of the day participants will have developed skills in three main areas:

- interpreting accounts, including the identification of problem areas
- interviewing clients in order to gain information and resolve queries
- establishing the journals required to finalise a set of accounts.

CONTENT

The day commences with formal lecturing on the interpretation of accounts including the use of ratios.

Most of the day revolves around a case study incorporating both individual and group work.

Participants are given a draft set of accounts, full of errors, for a fictitious client, Leisure Products. Using ratios and analytical review groups of 4 - 6 participants prepare a list of queries to resolve with the client.

Lecturing is given on interview techniques and each group appoints an interviewer to conduct the client interview as part of a role play.

Finally as a result of the information gained, participants are asked to produce journals and finalise the accounts.

CPD HOURS: 6

Venue	Date	Time
Colchester	24 Nov	09:30-16:30
High Wycombe	12 Mar	09:30-17:15
Leeds	22 Mar	09:30-17:00
London	5 May & 23 Jun	09:30-16:30
Manchester	9 Mar	09:30-17:00
Newcastle upon Tyne	15 Mar	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

Accounts Preparation Skills

WHO SHOULD ATTEND

Preparing accounts from source records is fundamental to all accounts staff.

The course is suitable for anyone who has knowledge of the principles of bookkeeping and has been involved in accounts preparation assignments for between 3 and 9 months. The course is intended to ensure any basic problems or misunderstandings are eliminated at an early stage and give a complete overview of the assignment from start to finish.

OBJECTIVES

While many areas of audit fieldwork are routine, this course will cover the common weaknesses encountered as well as the methods and techniques to be employed in more complex and unusual cases (including some from specialist areas). At the end of the course participants will have a strong appreciation of typical problems encountered on audits, together with solutions to these problems.

CONTENT

The course consists of a mixture of formal lecturing, case studies and discussions designed to highlight a range of common problem audit areas such as:

- Fixed assets (including tangible, intangible and investments as well as impairment reviews)
- Stock and work in progress
- Income recognition and completeness of income testing
- Debtors and creditors (including debt factoring and intra-group issues)
- Directors and related party transactions
- Provisions, share capital and reserves
- Going concern and subsequent events

CPD HOURS: 6

Venue	Date	Time
Birmingham	22 Feb & 8 Nov	09:30-17:00
Bristol	23 Feb	10:00-17:00
Cambridge	11 Nov	09:30-17:00
Colchester	30 Nov	09:30-16:30
Exeter	17 Nov	09:30-16:30
High Wycombe	25 Nov	09:30-17:15
Lancaster	23 Nov	09:30-17:00
Leeds	15 Feb	09:30-17:00
Leicester	16 Feb & 2 Nov	09:30-17:00
London	1 Mar & 22 Nov	09:30-16:30
Manchester	15 Feb	09:30-17:00
Newcastle upon Tyne	1 Feb	09:30-17:00
Northampton	3 Nov	09:30-17:00
Nottingham	25 Feb & 12 Nov	09:30-17:00
Oxford	5 Feb	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

Audit Exemption and Abbreviated Accounts

WHO SHOULD ATTEND

Many small companies, that no longer require an audit, still appoint accountants to help them prepare financial statements in accordance with accounting standards and the Companies Act. This often also includes the preparation of abbreviated accounts. The course is essential for anyone wishing to gain an introduction to the required approach for these types of entity. The relevance of the course will depend upon participants practical experience, however, as a guideline, it will be suitable for those who have worked between 10 and 24 months in the profession. For those who are studying it should be attended before sitting professional stage (ACA), part two (ACCA) or technician stage (AAT) exams.

OBJECTIVES

By the end of the course participants will understand Companies Act criteria for small and medium sized companies and what is included in abbreviated accounts. They will also understand when audit exemption applies together with the necessary disclosures.

CONTENT

Formal introductions to abbreviated accounts and audit exempt companies covering:

- eligibility
- types of accounts
- reports of auditors and accountants
- problem areas.

Case studies / questions will be interspersed to ensure understanding of the above.

CPD HOURS: 3

Venue	Date	Time
Belfast*	22 Oct	14:00-17:00
Birmingham	29 Jun & 6 Oct	14:00-17:00
Cambridge	19 Oct	14:00-17:00
Colchester	26 Oct	13:30-16:30
High Wycombe	11 Mar	14:00-17:15
Lancaster	19 Feb	14:00-17:00
Leeds	13 Oct	14:00-17:00
Leicester	18 May	14:00-17:00
London	19 Oct & 10 Dec	13:30-16:30
Manchester	15 Oct	14:00-17:00
Newcastle upon Tyne	2 Nov	14:00-17:00
Northampton	5 Nov	14:00-17:00
Nottingham	7 May & 29 Oct	14:00-17:00
Oxford	5 Oct	14:00-17:00
Peterborough	16 Jul	14:00-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£45 plus VAT per person

Auditing the Difficult Areas

WHO SHOULD ATTEND

This course is intended for those staff who are involved in audits and have to make decisions as to how to obtain sufficient audit evidence to prove a particular assertion or assertions.

While standard audit programmes cover routine areas, this course will cover the methods and techniques to be employed in more complex and unusual cases.

The course will be suitable for all staff who have responsibility for preparing audit files up to review stage, and will generally be most appropriate for those who have completed between 18 and 36 months in the profession.

OBJECTIVES

This course assumes basic knowledge of audit principles and techniques. The course will focus on more difficult areas found on assignments.

CONTENT

The course consists of a mixture of formal lecturing, case studies and discussions designed to highlight a range of common problem audit areas.

The course will cover issues such as:

- Intangible fixed assets
- Fixed asset impairments
- Stock and work in progress valuations
- Long term contracts
- Debt factoring
- Provisions
- Related party transactions
- Laws and regulations
- Going concern and subsequent events

CPD HOURS: 3

Venue	Date	Time
Birmingham	26 Feb & 13 Oct & 2 Nov	09:30-13:00
Bristol	16 Nov	13:30-17:00
Cambridge	9 Nov	09:30-13:00
Colchester	23 Nov	13:30-16:30
Exeter	4 Mar	09:30-13:00
High Wycombe	13 Jul	09:30-13:00
Leeds	17 Nov	09:30-13:00
Leicester	16 Mar & 16 Nov	09:30-13:00
London	29 Sep 23 Nov	09:30-13:00
Manchester	10 Nov	09:30-13:00
Newcastle upon Tyne	16 Mar	09:30-13:00
Nottingham	11 May & 26 Oct	09:30-13:00
Peterborough	14 Jul	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Charities: An Introduction

WHO SHOULD ATTEND

The course is aimed at those who act for charities. It is suitable for people with little or no experience of charities' work. However, it will provide a useful recap for those who have not been involved in such work recently but who would like an update on the latest accounting and reporting requirements.

Anyone with more experience of such assignments should consider attending "Charities : Key Problem Areas" or "Charities: Current Issues".

OBJECTIVES

Acting for charities is high profile work as there is generally a wider public interest in the charity than for the typical audit of a commercial company, as well as accountability to the regulatory authority, the Charity Commission. It is difficult to know if the accounting and reporting requirements are being achieved unless you understand what they are.

On completion of this course participants will understand what the rules and regulations concerning charities and understand how to act for charities in practice. The course will fully reflect the latest rules, whilst highlighting the key differences arising from recent changes.

CONTENT

- Overview of charity legislation for unincorporated and incorporated charities
- The accounting requirements of Charities Act, Companies Act and SORP 2005
- Fund accounting
- The Statement of Financial Activities and other accounting requirements
- The role of the Independent Examiner, the Reporting Accountant and the Auditor
- Small charities
- Trustees and the trustees' report

The course will be a combination of lecturing, case studies, discussions and questions. It will also incorporate extracts from our Specialist Assignment Manual (SAM).

CPD HOURS: 3

Venue	Date	Time
Birmingham	17 Mar & 4 Oct	09:30-13:00
High Wycombe*	6 Jul	09:30-13:00
Lancaster	19 May	09:30-13:00
Leeds*	7 May	14:00-17:00
Leicester	24 Mar & 3 Nov	09:30-13:00
London*	12 May	14:00-17:00
Manchester*	24 May	14:00-17:00
Northampton	15 Mar	09:30-13:00
Nottingham	8 Feb & 27 Oct	09:30-13:00
Peterborough	15 Apr	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£45 plus VAT per person

Auditing: First Principles

WHO SHOULD ATTEND

The course is an essential introduction to the purpose and principles of auditing. The course is suitable for anyone who has recently become or is about to become involved in auditing and had at least 3 months in the profession. Knowledge of the principles of bookkeeping is assumed.

The course is also suitable for any member of staff wanting a basic revision of current auditing standards and methodologies.

OBJECTIVES

Participants will understand the basic principles of auditing including the requirements of statements of auditing standards. The course will provide an overview of the key aspects of the audit process.

CONTENT

What is an audit and why do we audit? Discussion of the definition of an audit (including ethical aspects of auditor independence and integrity) and the reasons why audits are conducted.

Explanations of the following areas (matching reference to the applicable auditing standards):

- planning, controlling and recording;
- accounting systems and internal controls;
- audit evidence (including how to gather and record it);
- reporting.

The course will be a mixture of lecturing, discussions and exercises to ensure the participants understand the practical principles involved.

CPD HOURS: 3

Venue	Date	Time
Belfast*	24 Nov	09:30-13:00
Birmingham	20 Jan & 16 Jun	09:30-13:00
Bristol	29 Mar	10:00-13:00
Colchester	12 Apr	09:30-13:00
Exeter	7 Dec	09:30-13:00
High Wycombe	15 Mar	09:30-13:00
Lancaster	24 Nov	09:30-13:00
Leeds	16 Feb	09:30-13:00
Leicester	11 Jan	09:30-13:00
London	19 Jan & 1 Jun	09:30-13:00
Manchester	16 Feb	09:30-13:00
Newcastle upon Tyne	2 Feb	09:30-13:00
Nottingham	9 Jun	09:30-13:00
Oxford	17 Mar	09:30-13:00
Peterborough	23 Mar	09:30-13:00
Stirling*	16 Feb	09:30-16:30

* Alternative prices apply at these venues

£45 plus VAT per person

How to Audit Series

WHO SHOULD ATTEND

This course is designed to put theory into practice. It is suitable for anyone who has recently become involved or is about to become involved in auditing and had at least 3 months in the profession. Knowledge of the principles of bookkeeping is assumed. The course is also suitable for any member of staff wishing to revise basic techniques and learn about current methodologies.

‘How to Audit’ Bank And Cash

OBJECTIVES

Participants will have reviewed the audit evidence available for bank and cash and made effective use of it to prove the audit objectives.

CONTENT

Introduction to cash and bank, objectives of the section and main audit areas.

Review of the various sources of audit evidence available.

Audit of bank reconciliation. Discovery of window-dressing and therefore an adjustment is required. Covers how to deal with adjustments and points for partners attention.

Consideration of audit work on other accounts (deposits account, loan account, foreign currency and petty cash).

Use will be m*ade of lecture examples and practical work based on the case study – Woolly Jumpers Knitwear Ltd.*

‘How to Audit’ Debtors

OBJECTIVES

Participants will understand the various methods available to test debtors and the suitability of each in differing circumstances.

CONTENT

Introduction to debtors, objectives of the section and main audit areas.

Review of the possible analytical procedures which could be used in connection with debtors.

Debtors Circularisation. Participants reconcile circularisation replies using sales invoice listing, cash received after date and information on credit note provisions and bad debts. Participants complete the debtors confirmation working paper and the confirmation results summary.

Introduction to audit of bad debts, consideration of cut off, credit note provision, other debtors and prepayments.

Completion of trade debtors schedule, lead schedule, cross-referencing of whole section and completion of Audit Programme.

Use will be made of lecture examples and practical work based on the case study – Woolly Jumpers Knitwear Ltd.

How to Audit Series continued

‘How to Audit’ Creditors

OBJECTIVES

Participants will understand the objective which needs to be proved when testing creditors and the ways to gather sufficient evidence.

CONTENT

Introduction to creditors, objective of the section and main audit areas.

Review of the possible analytical procedures which could be used in connection with creditors.

Creditors Statement Reconciliation. Participants reconcile statements to the clients manual purchase ledger and complete the creditors reconciliation working paper, summarise their results and draw a conclusion.

Working papers for the following areas are already on the participant’s files and the audit work is discussed regarding cut-off, search for unrecorded liabilities, accruals and other creditors.

Leases and Hire Purchase. Explanation of the treatment under FRSSE via an example.

Use will be made of lecture examples and *practical work based on the case study – Woolly Jumpers Knitwear Ltd.*

‘How to Audit’ Fixed Assets

OBJECTIVES

Participants will gain an understanding of the audit objectives to be proved and the evidence available for fixed asset testing.

CONTENT

Introduction to fixed assets, objectives of the section and main audit areas.

Participants are given the client’s Fixed Asset lead schedule, working papers and relevant invoices plus extractions from the minutes and the repairs and maintenance account, and physical verification schedule. They are required to audit the section updating the Fixed Asset register in the process. Several errors are discovered giving further experience in scheduling of potential adjustments.

Review of case study and any points arising.

Use will be made of lecture examples *and practical work based on the case study – Woolly Jumpers Knitwear Ltd.*

‘How to Audit’ Stock

OBJECTIVES

Participants will cover the key issues concerning stock and how to effectively gather evidence to gain assurance on those areas.

CONTENT

Introduction to the audit of stock, objectives of the section and audit work. Emphasis is placed on the high risk nature of the audit area.

Stock take attendance. Participants have the completed documentation for WJK Ltd on file and the procedure is discussed.

Participants will be given the results of a stock take attendance sheet and expected to follow these through to the final sheets, investigating any errors.

Valuation. A short talk is given on valuation methods, cost and audit work. The case study will then be used to apply the appropriate method.

Use will be made of lecture examples *and practical work based on the case study – Woolly Jumpers Knitwear Ltd.*

CPD HOURS: 15

Venue	Date	Time
Belfast*	24 Nov - 26 Nov	09:30-17:00
Birmingham	20 Jan - 22 Jan	09:30-17:00
	16 Jun - 18 Jun	09:30-17:00
Colchester	12 Apr - 14 Apr	09:30-16:30
Exeter	8 Dec - 9 Dec	09:30-17:00
High Wycombe	15 Mar - 17 Mar	09:30-17:15
Lancaster	24 Nov - 26 Nov	09:30-17:00
Leeds	16 Feb - 18 Feb	09:30-17:00
Leicester	11 Jan - 13 Jan	09:30-17:00
London	19 Jan - 21 Jan	09:30-16:30
	1 Jun - 3 Jun	09:30-16:30
Manchester	16 Feb - 18 Feb	09:30-17:00
Newcastle upon Tyne	2 Feb - 4 Feb	09:30-17:00
Nottingham	9 Jun - 11 Jun	09:30-17:00
Oxford	17 Mar - 19 Mar	09:30-17:00
Peterborough	23 Mar - 25 Mar	09:30-17:00

Please note: At all venues except Exeter, this course starts in the afternoon on the first day.

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£225 plus VAT per person

Charities: Key Problem Areas

WHO SHOULD ATTEND

The course is aimed at those who act for charities as accountants, examiners or auditors. It is suitable for people who already have experience of charities' work and who, therefore, have a firm grasp of the basic principles. It will also be useful for those who would like an update on the latest accounting and reporting requirements.

OBJECTIVES

Over a relatively short period of time, the charities sector has been (or is to be) affected by the introduction of a revised Statement of Recommended Practice (SORP), a Charities Bill, new auditing and ethical standards and numerous pronouncements from the Charity Commission.

The course will fully reflect the latest rules, whilst highlighting the key differences arising from recent and proposed changes. Also, the purpose of the course is to address the key problem areas that arise on such assignments and to provide practical solutions.

CONTENT

- Fund accounting
- The trustees' report (including statement of policies on training of trustees, reserves, investments and grants and risk management disclosures)
- Recognition of incoming resources
- Accounting for activities
- Key audit issues on charity assignments with reference to International Auditing and Ethical Standards
- Reporting to the Charity Commission

The course will be a combination of lecturing, case studies, discussions and questions designed to ensure as much information is retained as possible. Reference will be made to Charity Commission publications, operating guidance, inquiry reports and other publications where appropriate. It will also incorporate extracts from our Specialist Assignment Manual (SAM).

CPD HOURS: 3

Venue	Date	Time
Bristol	15 Nov	10:00-13:00
Colchester	23 Nov	09:30-13:00
High Wycombe	10 May	09:30-13:00
Leeds	18 Nov	09:30-13:00
London	4 May & 7 Oct	09:30-13:00
Manchester	9 Nov	09:30-13:00
Newcastle upon Tyne	19 Nov	09:30-13:00
Oxford	11 Oct	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Principles of Bookkeeping

WHO SHOULD ATTEND

The course is essential for anyone who is new to accounting and wishes to understand bookkeeping and accounts preparation. A must for all starters!

OBJECTIVES

At the end of the course participants will be familiar with the basic principles of double entry bookkeeping, and will have prepared trial balances, profit and loss accounts and balance sheets to a basic level.

CONTENT

The day commences with an introduction to double entry bookkeeping and consideration of accounting records, types of business and methods of bookkeeping.

Participants will be shown how to:

- open accounts for individual transactions;
- post entries to T-accounts;
- record cash and credit transactions;
- extract a trial balance; and
- prepare of profit and loss account and balance sheet.

CPD HOURS: 6

Venue	Date	Time
Belfast*	20 Sep	09:30-17:00
Birmingham	8 Feb & 13 Sep & 27 Sep	09:30-17:00
Bristol	6 Sep	10:00-17:00
Colchester	27 Sep	09:30-16:30
Lancaster	20 Sep	09:30-17:00
Leeds	20 Sep	09:30-17:00
Leicester	1 Feb & 6 Sep	09:30-17:00
London	8 Feb & 6 Sep & 20 Sep	09:30-16:30
Manchester	13 Sep	09:30-17:00
Newcastle upon Tyne	13 Sep	09:30-17:00
Nottingham	13 Sep	09:30-17:00
Oxford	20 Sep	09:30-17:00
Peterborough	20 Sep	09:30-17:00
Stirling*	23 Aug	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£90 plus VAT per person

Bookkeeping: The Next Stage

WHO SHOULD ATTEND

The course is relevant for anyone who is new to accounting and wishes to understand bookkeeping and accounts preparation. It is ideally combined with Principles of Bookkeeping, but is also an excellent stand alone course for those with an existing basic knowledge.

OBJECTIVES

By the end of the course participants will be able to make common year-end adjustments. They will be familiar with the production of journals to effect adjustments and with roll-forward procedures.

CONTENT

Participants will be introduced to:

- accruals;
- prepayments;
- bad debts;
- depreciation and fixed asset disposals; and
- stock.

Lecture sessions will be illustrated with examples and short exercise questions.

CPD HOURS: 6

Venue	Date	Time
Belfast*	21 Sep	09:30-17:00
Birmingham	9 Feb & 14 Sep & 28 Sep	09:30-17:00
Bristol	7 Sep	10:00-17:00
Colchester	28 Sep	09:30-16:30
Lancaster	21 Sep	09:30-17:00
Leeds	21 Sep	09:30-17:00
Leicester	2 Feb & 7 Sep	09:30-17:00
London	9 Feb & 7 Sep & 21 Sep	09:30-16:30
Manchester	14 Sep	09:30-17:00
Newcastle upon Tyne	14 Sep	09:30-17:00
Nottingham	14 Sep	09:30-17:00
Oxford	21 Sep	09:30-17:00
Peterborough	21 Sep	09:30-17:00
Stirling*	24 Aug	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£90 plus VAT per person

Bookkeeping Case Study

WHO SHOULD ATTEND

The course is relevant for anyone who is new to accounting and wishes to understand how manual bookkeeping and accounts preparation works in practice.

It builds on the theory covered in Principles of Bookkeeping and Bookkeeping: The Next Stage and is ideally combined with these courses, although it also serves as an excellent stand-alone unit for those who have grasped the principles but would appreciate a more practical demonstration of the techniques involved.

Daybooks

OBJECTIVES

By the end of the course participants will have had practical exposure to daybooks by completing two months of transactions for a fictional client, "Wanda of Whetstone".

CONTENT

Participants will gain experience of manual bookkeeping through writing up:

- sales daybook from sales invoices;
- purchase daybook from purchase invoices;
- cashbook from paying-in slips and cheque stubs; and
- petty cash book from vouchers and bank receipts.

In addition, participants will be taken through bank reconciliation procedures.

As well as exposure to manual bookkeeping, participants will also be shown how daybooks appear when accounts preparation packages such as Sage are used.

Ledgers

OBJECTIVES

By the end of the course participants will have had practical exposure to ledgers by completing two months of transactions for a fictional client, "Wanda of Whetstone".

CONTENT

Participants will gain experience of manual bookkeeping through:

- writing up sales ledger from sales daybook and cashbook receipts;
- writing up purchase ledger from purchase daybook and cashbook payments;
- balancing off sales and purchase ledgers; and
- extracting lists of balances.

As well as exposure to manual bookkeeping, participants will also be shown how ledgers appear when accounts preparation packages such as Sage are used.

Balancing Off

OBJECTIVES

By the end of the course participants will have had practical exposure to control accounts and trial balances by completing two months of postings for a fictional client, "Wanda of Whetstone".

CONTENT

Participants will gain experience of manual bookkeeping through:

- posting from daybooks into sales and purchase ledger control accounts;
- reconciling control accounts with sales and purchase ledger balances;
- posting remaining daybooks into the nominal ledger; and
- balancing-off accounts and extracting a preliminary trial balance.

As well as exposure to manual bookkeeping, participants will also be shown how ledgers and trial balances appear when accounts preparation packages such as Sage are used.

ETB, Journals and Final Accounts

OBJECTIVES

By the end of the course participants will have had practical exposure to daybooks by completing an extended trial balance for a fictional client, "Wanda of Whetstone".

CONTENT

Participants will gain experience of manual bookkeeping through:

- preparing journals for period-end adjustments;
- calculating accruals and prepayments;
- extending a trial balance; and
- drafting a trading and profit and loss account and balance sheet.

As well as exposure to manual bookkeeping, participants will also be shown how journals and final accounts appear when accounts preparation packages such as Sage are used.

CPD HOURS: 12

Venue	Date	Time
Belfast*	22-23 Sep	09:30-17:00
Birmingham	10-11 Feb	09:30-17:00
	15-16 Sep & 29-30 Sep	09:30-17:00
Colchester	29-30 Sep	09:30-16:30
Lancaster	22-23 Sep	09:30-17:00
Leeds	22-23 Sep	09:30-17:00
Leicester	3-4 Feb	09:30-17:00
	8-9 Sep	09:30-17:00
London	10-11 Feb	09:30-16:30
	8-9 Sep & 22-23 Sep	09:30-16:30
Manchester	15-16 Sep	09:30-17:00
Newcastle upon Tyne	15-16 Sep	09:30-17:00
Nottingham	15-16 Sep	09:30-17:00
Oxford	22-23 Sep	09:30-17:00
Peterborough	22-23 Sep	09:30-17:00
Stirling*	25-26 Aug	09:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£180 plus VAT per person

Company Accounting Problems

WHO SHOULD ATTEND

Meeting the accounting and disclosure requirements for limited company accounts can be particularly difficult where either there are changes in company law and accounting standards or where the company undertakes a transaction which, though not rare, only occurs occasionally.

The course will be suitable for staff involved with the preparation of company accounts. It would be most beneficial to participants who have been involved in such assignments for between 20 and 36 months. For those staff who are studying, this course will work best for: CA staff who have completed the professional stage; for ACCA staff who are on the professional level; and for qualified AAT staff.

OBJECTIVES

This course assumes a basic understanding of company financial statements. The course highlights common problems with completeness and adequacy of disclosure.

CONTENT

The course consists of a mixture of formal lecturing, case studies and discussions designed to highlight a range of common disclosure and accounting errors. These would include situations such as a revaluation in the year, disposal of a revalued asset, prior year adjustments, provisions, leases and directors' interests and emoluments.

The course also covers:

- Companies Act, SSAP and FRS disclosure requirements
- Small company exemptions and the FRSSE
- Provisions and contingencies
- Director disclosures and related party disclosures
- Dormant companies
- Common reasons for rejection of accounts

CPD HOURS: 6

Venue	Date	Time
Belfast*	4 Mar	09:30-17:00
Bristol	6 Dec	10:00-17:00
Exeter	5 Mar	09:30-16:30
Lancaster	9 Nov	09:30-17:00
Oxford	5 Mar	09:30-17:00
Stirling*	10 Mar	09:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£90 plus VAT per person

Effective Small Company Audits

WHO SHOULD ATTEND

The course will be ideal for staff who are engaged on small company audits.

It is designed for those who have had between 15 - 24 months in the profession and who are responsible for carrying out small audit assignments cost effectively. More experienced staff may find it a useful refresher.

OBJECTIVES

This course will look at the problems presented by the audit of small companies and how they can be overcome.

The course will refer to planning and completion issues, but will focus on the fieldwork stage.

CONTENT

The course will consist of a mixture of case studies combined with lecturing.

Consideration of risk and materiality for these types of assignments and how the overall plan should take into account any accounts preparation work.

Consideration of the use of analytical and detailed testing to obtain audit evidence.

Illustration of how to obtain audit evidence from accounts preparation and other work undertaken for a client.

Coverage of how to summarise results for partners' attention.

CPD HOURS: 3

Venue	Date	Time
High Wycombe	11 May	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Effective Use of Analytical Procedures

WHO SHOULD ATTEND

This course is suitable for audit seniors / semi-seniors who have some experience in using analytical procedures but would benefit from a review of how to use them effectively. It is particularly suited to those involved in audit fieldwork in cases where peer reviews or monitoring visits have identified problems with the use of analytical procedures.

The relevance of the course will depend upon participants' practical experience; however, as a guideline, it will be most suited to those with 18 - 48 months' auditing experience. More experienced staff may find it a useful refresher if they have been away from audits for some time.

For those with less experience or who are new to analytical procedures, the "Understanding Analytical Procedures" course will be more suitable.

OBJECTIVES

By the end of the course participants will understand the skills and knowledge required in order to implement the effective use of analytical techniques at all stages of an audit.

CONTENT

The course combines lecture sessions with case study examples to illustrate the practical use of analytical procedures.

- Understanding clients and building up expectations for use in analysis
- Using analytical procedures to provide substantive evidence
- Recording and corroborating the results of analytical procedures
- Using IT for effective analytical review
- Analytical procedures at the completion stage

CPD HOURS: 3

Venue	Date	Time
Birmingham	25 Feb & 12 Oct & 1 Nov	14:00-17:00
Cambridge	8 Nov	14:00-17:00
Colchester	2 Mar	09:30-13:00
High Wycombe	14 Jul	09:30-13:00
Leeds	10 May	09:30-13:00
Leicester	15 Mar & 15 Nov	14:00-17:00
London	3 May & 24 Jun	09:30-13:00
Manchester	8 Mar	09:30-13:00
Newcastle upon Tyne	6 May	09:30-13:00
Nottingham	10 May & 25 Oct	14:00-17:00
Peterborough	13 Jul	14:00-17:00

Venue details provided with booking confirmation

£45 plus VAT per person

Efficient File Completion

WHO SHOULD ATTEND

The course will be ideal for seniors or semi-seniors who are responsible for completing audit or audit exempt assignments, and who present jobs for manager review in a virtually finished state. It is likely that they will have had at least 18 to 24 months in the profession and will be familiar with period end adjustments, but will be relatively new to the completion process.

OBJECTIVES

The course will look at the issues involved in the final stages of an assignment. It will identify how and why inefficiencies arise at this stage and how these inefficiencies can be minimised.

The technical aspects of audit file completion will be covered in detail.

CONTENT

The course will consist of a mixture of case studies and discussion exercises combined with lecturing. Attention will be given to common areas in which efficiency can be improved.

In addition, the following technical and administrative areas will be considered:

- Final analytical review
- Points forward
- Representation letters
- Reports to management
- Post balance sheet events
- Going concern
- Accounts disclosure checklist
- Points for manager / partner
- Errors and deviations
- File review - common problems
- Audit summary memorandum

CPD HOURS: 3

Venue	Date	Time
Belfast*	30 Apr	09:30-13:00
Birmingham	26 Feb & 13 Oct & 2 Nov	14:00-17:00
Cambridge	9 Nov	14:00-17:00
Lancaster	30 Jun	14:00-17:00
Leicester	16 Mar & 16 Nov	14:00-17:00
Nottingham	11 May & 26 Oct	14:00-17:00
Oxford	11 Oct	14:00-17:00
Peterborough	14 Jul	14:00-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£45 plus VAT per person

Ethical Standards: A Practical Review

WHO SHOULD ATTEND

The course is aimed at those involved in the planning and completion stages of audit assignments. It will be particularly useful for seniors and semi seniors involved in these stages of the audit. A knowledge of basic audit procedures is assumed.

OBJECTIVES

The provisions in the 5 Ethical Standards (ESs), as well as the Provisions Available for Small Entities (PASE) where appropriate, have been mandatory for all true and fair audits in the UK and Ireland since the end of 2005. There is currently a Consultation Paper in issue with some proposed revisions to these standards.

On completion of the course, participants will be aware of the detailed requirements of the standards and will have a practical understanding of how these standards will impact on the performance of an audit and on the level of documentation required.

CONTENT

- Detailed contents of the ESs (including PASE).
- The effect of these on the audit approach, procedures and documentation.
- The impact on both small audits and small audit firms.
- Proposed revisions in the Consultation Paper.

Practical case studies, quizzes and discussion exercises will be used throughout the course to illustrate the issues raised.

CPD HOURS: 3

Venue	Date	Time
Bristol	15 Nov	13:30-17:00
Exeter	4 Mar	13:30-16:30

Venue details provided with booking confirmation

£45 plus VAT per person

File Review Skills

WHO SHOULD ATTEND

This is an essential course to ensure staff appreciate what is involved in reviewing colleagues' work effectively and efficiently.

This course is appropriate for seniors who are already or will soon be reviewing other peoples' work. It will also provide a useful refresher for experienced reviewers of audit and accounts assignments.

OBJECTIVES

This session explores the techniques essential when reviewing work undertaken by colleagues. It is not intended to cover aspects of review at the planning or final completion stages of an assignment.

At the end of the course participants will benefit from an understanding of what is involved in the review process along with the techniques required to undertake an effective review.

CONTENT

The course will consist of a mixture of lecturing, discussion exercises and case studies. The discussions will highlight the issues that should be considered. The case studies, which include a role play, will provide an opportunity for participants to practice these skills.

Specifically, the course will cover the following:

- Consideration of the objectives of review.
- How the review process should be carried out and how review points should be cleared.
- Practice in reviewing an accounts preparation section of a file followed by a role play meeting in which the review points are discussed.
- Additional principles and considerations required in reviewing audit work.

CPD HOURS: 3

Venue	Date	Time
Colchester	2 Mar	13:30-16:30
High Wycombe	14 Jul	14:00-17:15
Leeds	10 May	14:00-17:00
London	3 May & 24 Jun	13:30-16:30
Manchester	8 Mar	14:00-17:00
Newcastle upon Tyne	6 May	14:00-17:00
Stirling*	3 Dec	13:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£45 plus VAT per person

Money Laundering: A Refresher

WHO SHOULD ATTEND

The course is intended to update all staff on changes to the money laundering regulations and will provide an opportunity to revisit the core issues of what is a suspicious activity and what should be reported to the MLNO and SOCA.

The course will be based on the Money Laundering Regulations 2007 and will therefore be a useful refresher for staff who have not received any training since the original regulations were introduced.

Please note that this course is not intended for Money Laundering Nominated Officers.

OBJECTIVES

This course will revisit the definition of money laundering, how it arises, how it is detected, what to do if you suspect it and what procedures should be in place to prevent and detect it. It will focus on the changes to procedures required by the Money Laundering Regulations 2007, in particular the Customer Due Diligence requirements.

CONTENT

The following areas will be covered:

- Definitions in the Proceeds of Crime Act and the Money Laundering Regulations 2007
- Indications of money laundering
- Requirements of the 2007 regulations, particularly those relating to customer due diligence
- Auditors' responsibilities and ISA+ 240, ISA+ 250 and Practice Note 12
- Reporting requirements, particularly reporting to SOCA.

The course will be a combination of lecturing, discussions and short questions to illustrate the points and to practise identifying the key issues.

CPD HOURS: 3

Venue	Date	Time
Lancaster	30 Jun	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Money Laundering: An Introduction for New Starters

WHO SHOULD ATTEND

The course is important for all staff whether technical or administrative.

This course is intended as an introduction to the money laundering rules and therefore will be of most benefit to those who have never had any money laundering training. It may also serve as a refresher, however it should be noted that it is not a course purely focusing on recent changes in legislation.

OBJECTIVES

This course will cover the definition of money laundering, how it arises, how it is detected, what to do if you suspect it and what procedures should be in place to prevent and detect it.

CONTENT

The following areas will be covered:

- How is money laundering committed?
- Indications of money laundering
- Accountants' responsibilities
- Prevention
- Auditors' responsibilities and ISA+ 240, ISA+ 250 and Practice Note 12
- Reporting requirements, particularly reporting to SOCA.

The course will be a combination of lecturing, discussions and short questions to illustrate the points and to practise identifying the key issues.

CPD HOURS: 3

Venue	Date	Time
Belfast*	5 Oct	09:30-13:00
Birmingham	17 Mar & 4 Oct	14:00-17:00
Colchester	15 Feb	09:30-13:00
High Wycombe	10 May & 11 Oct	14:00-17:15
Leeds	18 Nov	14:00-17:00
Leicester	24 Mar & 3 Nov	14:00-17:00
London	4 May & 7 Oct	13:30-16:30
Manchester	9 Nov	14:00-17:00
Newcastle upon Tyne	19 Nov	14:00-17:00
Northampton	15 Mar	14:00-17:00
Nottingham	8 Feb & 27 Oct	14:00-17:00
Peterborough	15 Apr	14:00-17:00
Stirling*	16 Nov	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£45 plus VAT per person

Planning an Effective Audit

WHO SHOULD ATTEND

One of the key sections to ensure audits are carried out properly and efficiently is planning.

The course will be relevant to all staff who are involved in planning assignments. It is ideally suited to those who are relatively new to planning, but will also be useful as a refresher for those who consider that their planning needs to be more effective.

It is expected that the course will be suitable for staff with between 24 and 36 months experience in the profession and a reasonable knowledge of audit fieldwork techniques.

OBJECTIVES

At the end of the course participants will understand the key aspects of the planning process to effectively carry out an audit.

CONTENT

- Purpose of planning and the process by which it is achieved
- Relevant ISAs (UK and Ireland) will be considered and their application will be illustrated by audit manual documentation
- Case studies covering obtaining business knowledge, risk assessment, materiality and the preparation of overall audit plans.

CPD HOURS: 3

Venue	Date	Time
Belfast*	30 Apr	14:00-17:00
Bristol	16 Nov	10:00-13:00
Colchester	15 Feb	13:30-16:30
High Wycombe	13 Jul	14:00-17:15
Leeds	17 Nov	14:00-17:00
London	29 Sep & 23 Nov	13:30-16:30
Manchester	10 Nov	14:00-17:00
Newcastle upon Tyne	16 Mar	14:00-17:00
Stirling*	3 Dec	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£45 plus VAT per person

Practical Small Company Reporting Requirements

WHO SHOULD ATTEND

The different regime for the financial reporting of small companies poses a challenge on two fronts. First of all, it creates rules that are different from larger clients. Also, it increases the client's expectation that the preparation of financial statements can be can be carried out expeditiously. Therefore, meeting the accounting and disclosure requirements for small limited company accounts as effectively and efficiently as possible requires a clear understanding of both what is required and why.

The course will be suitable for staff involved in the preparation of company accounts and assumes a basic understanding of company financial statements. It would be most beneficial to participants who have been involved in such assignments for between 18 and 36 months.

OBJECTIVES

This course is designed to highlight the key issues surrounding small company financial reporting so as to ensure less time is wasted on "real" client assignments.

CONTENT

The course consists of a mixture of formal lecturing, case studies and discussions designed to highlight the key difficulties when tackling small company assignments.

The course covers:
- Small company size criteria and status
- Audit exemption and abbreviated accounts
- Disclosure requirements in the FRSSE (including the Companies Act requirements)
- Key differences between small and large company disclosure requirements
- Small groups
- Common problem areas

CPD HOURS: 3

Venue	Date	Time
Birmingham	25 Feb & 12 Oct & 1 Nov	09:30-13:00
Cambridge	8 Nov	09:30-13:00
Leicester	15 Mar & 15 Nov	09:30-13:00
Nottingham	10 May & 25 Oct	09:30-13:00
Peterborough	13 Jul	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

The Audit and Accountancy Update

WHO SHOULD ATTEND

The course will be essential for anyone who is in a senior position of responsibility (seniors / managers) and who would value a practical update and refresher of both auditing and accounting. Thus it will be suitable to those who are about to take final examinations (or who have equivalent experience) and above. The programme will be changed annually, thus enabling participants to attend consecutive years.

OBJECTIVES

At the end of the course participants will be aware of the current position relating to auditing and accounting.

CONTENT

The course will cover new and emerging issues such as:

- FRSSE 2008
- FRS 8 (revised)
- FRS 30
- Companies Act 2006 – practical impact of changes
- APB and QAD feedback
- Audit reports under CA 2006
- Going concern
- Clarified ISAs

In addition, the course will include a refresher on topical issues from recent accounting and auditing standards. Attention will be given to common areas of difficulty encountered by accountants and auditors of small companies and will comprise a combination of lecturing and practical case studies to enable a full understanding to be gained.

CPD HOURS: 6

Venue	Date	Time
Belfast*	3 Mar	09:30-17:00
Birmingham	17 Mar & 16 Apr	09:30-17:00
Colchester	23 Mar	09:30-16:30
Exeter	24 Feb	09:30-16:30
Lancaster	10 Mar	09:30-17:00
Leicester	12 Mar	09:30-17:00
London	29 Mar & 26 Apr	09:30-16:30
Nottingham	30 Mar	09:30-17:00
Oxford	4 Mar	09:30-17:00
Peterborough	22 Mar	09:30-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£90 plus VAT per person

The Auditor at Risk

WHO SHOULD ATTEND

This course should be attended by all staff involved in auditing who need to update their understanding of the latest auditing standards regarding risk assessment, including fraud risk.

The relevance of the course will depend upon participants' practical experience. However, as a guideline, it will be suitable for those who have worked at least 18 months in the profession and have been involved in a number of audits.

OBJECTIVES

Currently, the emphasis on many audit courses is how to improve the efficiency of the assignment. Whilst this is a legitimate objective, there is a danger that one fails, when the situation arises, to exercise sufficient rigour in applying the rules when conducting the audit. This is especially important following the introduction of International Standards on Auditing (UK and Ireland), which further increase the focus on risk assessment and fraud risk.

The aim is to help all participants:

- improve audit risk assessment
- increase awareness of fraud risk
- understand the importance of quality control throughout the audit process
- audit some key balance sheet areas, including stock and creditors, more effectively
- highlight some common audit problems
- appreciate the possible consequences of a legal claim.

CONTENT

The course is based around an ICAEW video "The Auditor At Risk" which illustrates the impact that inadequate risk assessment can make on the audit firm. The course uses a mixture of lecture and discussions to explore the issues raised by the video case study.

In particular, there are discussions of the risks revealed in the case study and the failings of the audit team, and of the further responsibilities that ISA+s would have introduced for the audit process.

CPD HOURS: 3

Venue	Date	Time
High Wycombe	11 May	14:00-17:15

Venue details provided with booking confirmation

£45 plus VAT per person

UK GAAP for IAS Users

WHO SHOULD ATTEND

As a guide the course is likely to be most suitable for the following students: ACAs who have completed the professional stage, ACCAs who have completed the fundamental stage and qualified AAT.

The course is not designed to help those who are familiar with UK GAAP to understand IASs.

OBJECTIVES

The course is aimed at trainees who are studying international accounting standards (IASs) for professional exams but who need to apply UK SSAPs, FRSs and the FRSSE in practice. The course will help such trainees focus on the practical differences between the two regimes. Reasonable familiarity with IASs is assumed.

CONTENT

The course includes the following content:

- The convergence strategy for UK and international GAAP
- Presentation differences in primary statements
- Accounting differences – comparing standard to standard on key areas including:
  - Intangible and tangible fixed assets (including investment properties and leasing)
  - Stock and WIP
  - Provisions and contingencies
  - Revenue recognition
  - Employee benefits and pension costs
- Taxation in accounts and implications for UK tax

The course will consist of a combination of lecture sessions and exercises, including worked examples of the differences in accounting, presentation and disclosure between the two regimes.

CPD HOURS: 3

Venue	Date	Time
High Wycombe	6 Jul	14:00-17:15

Venue details provided with booking confirmation

£85 plus VAT per person

Understanding Analytical Procedures

WHO SHOULD ATTEND

The course is suitable for anyone who has recently become involved in or is about to become involved in auditing.

The relevance of the course will depend upon participants practical experience, but it is designed as an introduction to the principles involved and is therefore unlikely to be of benefit to those with significant experience.

As a guideline, it will be suitable for those who have worked 6 - 18 months in the profession, and for those who are studying it should be attended before sitting professional stage (ACA), certificate stage (ACCA) or technician stage (AAT) exams.

OBJECTIVES

By the end of the course participants should have an understanding of what analytical procedures involve and how to use basic procedures to gather evidence.

CONTENT

- What are analytical procedures? An overview of the various stages and how the audit benefits from effective use of analytical review.
- Analytical procedures (ISA +520) focusing on the field work incorporating:
  - trend analysis;
  - ratio analysis;
  - reasonableness tests; and
  - proof in total.

The course will be broken down into convenient sections and mini case studies / exercises will be used to ensure participants understand how to apply analytical techniques in practice.

CPD HOURS: 3

Venue	Date	Time
Belfast*	22 Oct	09:30-13:00
Birmingham	29 Jun & 6 Oct	09:30-13:00
Bristol	29 Mar	13:30-17:00
Cambridge	19 Oct	09:30-13:00
Colchester	26 Oct	09:30-13:00
Exeter	7 Dec	13:30-16:30
High Wycombe	11 Mar	09:30-13:00
Lancaster	19 Feb	09:30-13:00
Leeds	13 Oct	09:30-13:00
Leicester	18 May	09:30-13:00
London	19 Oct & 10 Dec	09:30-13:00
Manchester	15 Oct	09:30-13:00
Newcastle upon Tyne	2 Nov	09:30-13:00
Northampton	5 Nov	09:30-13:00
Nottingham	7 May & 29 Oct	09:30-13:00
Oxford	5 Oct	09:30-13:00
Peterborough	16 Jul	09:30-13:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Understanding Company Accounts

WHO SHOULD ATTEND

The course is essential for anyone new to the preparation of company accounts or who needs to revise this area. As a guideline however, for ACA and ACCA students, the course should normally be attended whilst sitting the professional or part two examinations. For all other members of staff this course can usually be completed after 12 to 24 months in the profession.

OBJECTIVES

The course will introduce the format and disclosure requirements of limited companies preparing accounts for their members. By the end of the day the participants will be familiar with a set of statutory accounts together with the relevant notes.

CONTENT

- Comparison of sole trader or partnership accounts with company accounts.
- Formal introduction to company accounts, accounting principles and policies.
- Profit and loss account - format and notes including reference to accounting standards.
- Balance sheet - format and notes, including relevant accounting standards.
- Exercises will be used to illustrate the contents of some of the disclosure notes.
- Discussion re using a computer accounts package to generate statutory accounts and highlighting main principles and typical errors applicable to all packages.
- Case study - participants will be introduced to the small company accounts disclosure checklist and will be required to review and amend a set of accounts for both disclosure requirements and presentation issues. Participants will then be required to discuss the accounts with the client.
- Discussion contrasting the differences in disclosures should the company not claim small company exemptions.

The course does not deal with the content of abbreviated accounts.

CPD HOURS: 6

Venue	Date	Time
Belfast*	21 Oct	09:30-17:00
Birmingham	28 Jun & 5 Oct	09:30-17:00
Bristol	30 Mar	10:00-17:00
Cambridge	18 Oct	09:30-17:00
Colchester	25 Oct	09:30-16:30
High Wycombe	10 Mar	09:30-17:15
Lancaster	18 Feb	09:30-17:00
Leeds	12 Oct	09:30-17:00
Leicester	17 May	09:30-17:00
London	18 Oct & 9 Dec	09:30-16:30
Manchester	14 Oct	09:30-17:00
Newcastle upon Tyne	1 Nov	09:30-17:00
Northampton	4 Nov	09:30-17:00
Nottingham	6 May & 28 Oct	09:30-17:00
Oxford	4 Oct	09:30-17:00
Peterborough	15 Jul	09:30-17:00
Stirling*	9 Mar	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£90 plus VAT per person

Business Tax 1

WHO SHOULD ATTEND

This course is suitable for those participants who have little or no existing tax knowledge or experience in this area. As a guideline it will be suitable for those who have worked between 3 and 15 months in the profession and it will help if they have previously attended Personal Tax 1.

It will not normally be suitable for those participants who are studying and have sat their first professional tax exam.

OBJECTIVES

By the end of the course participants will be familiar with the basic rules governing the calculation of taxable profits for a self-employed client.

CONTENT

- General principles of allowable/disallowable expenditure
- Plant and machinery capital allowances with case studies
- Determination of the Class 4 NIC liability
- Trading income computation
- Completion of the relevant self assessment pages

CPD HOURS: 6

Venue	Date	Time
Belfast*	5 Nov	09:30-17:00
Birmingham	18 Feb & 10 Nov	09:30-17:00
Bristol	5 Feb	10:00-17:00
Colchester	10 Dec	09:30-16:30
Exeter	24 Nov	09:30-16:30
High Wycombe	9 Feb	09:30-17:15
Lancaster	5 Mar	09:30-17:00
Leeds	24 Nov	09:30-17:00
Leicester	3 Dec	09:30-17:00
London	3 Mar & 17 Nov	09:30-16:30
Manchester	10 Dec	09:30-17:00
Newcastle upon Tyne	26 Nov	09:30-17:00
Northampton	2 Dec	09:30-17:00
Nottingham	17 Feb & 16 Nov	09:30-17:00
Oxford	16 Feb	09:30-17:00
Peterborough	5 Feb	09:30-17:00
Stirling*	9 Apr	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£90 plus VAT per person

Business Tax 2

WHO SHOULD ATTEND

This course is suitable for those participants who have attended the introductory session, Business Tax 1, or those who have a reasonable working knowledge of the basics of business tax.

The relevance of the course will depend upon participant's practical experience, however, as a guideline it will be suitable for those who have worked between 9 and 24 months in the profession. It will not normally be suitable for those participants who are studying and who have sat their first professional tax exam.

OBJECTIVES

At the end of the course participants will have built on the knowledge gained from the introductory session and will have considered commencement and cessation rules, the implications of a change of accounting date and also relief for losses. Participants will also have covered the basic rules concerning class 2 and class 4 national insurance contributions.

CONTENT

- Commencement and cessation rules
- Interaction with overlap profits/transitional relief
- Class 2 and Class 4 National Insurance
- Change of accounting date
- Loss relief
- Case study - sole trader client (commencing trading) – taxable trading profits.

CPD HOURS: 3

Venue	Date	Time
Birmingham	23 Mar	09:30-13:00
Bristol	6 Oct	10:00-13:00
Cambridge	1 Nov	09:30-13:00
Colchester	13 Oct	09:30-13:00
Exeter	10 Sep	09:30-13:00
High Wycombe	10 Aug	09:30-13:00
Leeds	18 Oct	09:30-13:00
Leicester	4 Mar	09:30-13:00
London	15 Feb & 8 Oct	09:30-13:00
Manchester	3 Nov	09:30-13:00
Newcastle upon Tyne	20 Oct	09:30-13:00
Northampton	16 Mar	09:30-13:00
Stirling*	5 May	09:30-13:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Capital Allowances

WHO SHOULD ATTEND

This course is suitable for those participants who have experience of completing tax computations for corporate and unincorporated clients.

This course is not suitable for participants who have no experience of capital allowances and as a guideline is appropriate for those with at least 24 months in the profession.

OBJECTIVES

To review basic capital allowance principles together with recent changes, including a look at some of the more problematic areas.

CONTENT

The course will include:

- Assets and expenditure qualifying for capital allowances
- Recent changes
- Problem areas
- Case studies

CPD HOURS: 3

Venue	Date	Time
Exeter	7 Oct	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Capital Gains Tax 2

WHO SHOULD ATTEND

This course is aimed at those who have a reasonable working knowledge of capital gains tax and would like the opportunity to tackle the computational elements of the rules.

The relevance of the course will depend upon participants practical experience, however, as a guidance it will be suitable for those who have worked between 12 and 24 months in the profession.

OBJECTIVES

To familiarise participants with the workings of capital gains tax, in particular Entrepreneurs' Relief, incorporating a look at some of the more problematic areas.

CONTENT

- Review of capital gains tax computations
- Entrepreneurs' Relief
- Deferral reliefs
- Principal Private Residence
- Case studies will be used to help illustrate the topics where appropriate

CPD HOURS: 3

Venue	Date	Time
Bristol	14 Apr	10:00-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Corporate Tax Case Study

WHO SHOULD ATTEND

This course is only suitable for those participants who have experience of completing corporate tax computations.

Participants must be familiar with accounts format and be conversant with trading income rules.

The relevance of the course will depend upon experience, however, as a guide it will be suitable for those who have worked at least 24 months in the profession.

OBJECTIVES

By the end of the course participants will be technically up to date as regards compliance work and the current technical issues likely to affect a typical family company.

CONTENT

- Detailed case study including accounts finalisation, deferred tax, capital gains computations and CTSA requirements.

Prior knowledge of corporation tax is assumed at this level.

CPD HOURS: 3

Venue	Date	Time
Exeter	7 Oct	13:30-16:30

Venue details provided with booking confirmation

£45 plus VAT per person

Corporation Tax 1

WHO SHOULD ATTEND

This course is suitable for those participants who have little or no experience in this area. Participants should normally attend this course after attending Business Tax 1 as a basic knowledge taxable trading income rules will be expected.

Participants will be expected to be familiar with company accounts format as a case study will be used to explain a number of key areas.

The relevance of the course will depend upon participants practical experience, however, as a guide it will be suitable for those who have worked between 9 and 24 months in the profession. It will not normally be suitable for those participants who are studying and have sat their first professional tax exam.

OBJECTIVES

By the end of the course participants will be familiar as to the scope and computation of tax payable in respect of corporate clients.

CONTENT

- Basic charging provisions - definition of profits, corporate tax rates
- Administration – CTSA and Quarterly Instalment Payments
- Case studies
- Comprehensive Case study (Fine Wines Ltd). Participants are given draft accounts and supporting schedules and asked to prepare a capital allowances computation, a statement showing profits chargeable to tax and corporation tax payable

NB: Participants need to be familiar with basic taxable trading income rules.

CPD HOURS: 3

Venue	Date	Time
Belfast*	8 Oct	09:30-13:00
Birmingham	23 Mar	14:00-17:00
Bristol	6 Oct	13:30-17:00
Cambridge	1 Nov	14:00-17:00
Colchester	13 Oct	13:30-16:30
Exeter	10 Sep	13:30-16:30
High Wycombe	10 Aug	14:00-17:15
Leeds	18 Oct	14:00-17:00
Leicester	4 Mar	14:00-17:00
London	15 Feb & 8 Oct	13:30-16:30
Manchester	3 Nov	14:00-17:00
Newcastle upon Tyne	20 Oct	14:00-17:00
Northampton	16 Mar	14:00-17:00
Stirling*	5 May	13:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Corporation Tax 2

WHO SHOULD ATTEND

This course is suitable for those participants who have some experience in this area and who would benefit from a course that will concentrate on the practical aspects. Participants should normally attend this course after attending Business Tax 1 and Corporation Tax 1 as a basic knowledge of trading profit rules and corporation tax computations will be expected.

The relevance of the course will depend upon participant's practical experience, however, as a guidance it will be suitable for those who have worked between 12 and 24 months in the profession.

OBJECTIVES

By the end of the course participants will be familiar with some of the more complex areas of corporate tax.

CONTENT

- Review of the essentials of a corporation tax computation
- Corporation tax payments
- Relief for losses
- Transactions with participators
- Groups
- Consideration of non trading profits including corporate gains

Case studies will be used where appropriate

CPD HOURS: 3

Venue	Date	Time
Oxford	27 Oct	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Expenses and Benefits Healthcheck

WHO SHOULD ATTEND

This course is suitable for those participants who have a good understanding of PAYE and benefits in kind. Participants should be familiar with the completion of forms P11D (or their review). They should also have an awareness of payroll procedures as prior knowledge will be assumed. As a guide participants should have been in practice between 24 and 36 months.

This course is not suitable for partners or managers with extensive experience in PAYE matters.

OBJECTIVES

Reviewing clients benefits and expenses procedures with a view to minimising potential exposure in respect of benefits and expenses issues.

CONTENT

- Review the areas which could lead to PAYE liabilities – concentrating on benefits in kind and expenses
- Common problem areas
- Recent changes in PAYE and NIC

NB: A good understanding of payroll procedures and P11D compliance issues will be assumed.

CPD HOURS: 3

Venue	Date	Time
Colchester	19 Feb	09:30-13:00
High Wycombe	7 Dec	09:30-13:00
Leeds	16 Mar	09:30-13:00
London	18 Mar & 15 Apr	09:30-13:00
Manchester	2 Mar	09:30-13:00
Newcastle upon Tyne	17 Mar	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Family Company Tax Considerations

WHO SHOULD ATTEND

This course is only suitable for those participants who have experience of completing corporate tax computations and who are aware of the rules for calculating commonly found benefits in kind.

Participants must be familiar with accounts format and be conversant with taxable trading income and employment income rules.

The relevance of the course will depend upon experience, however, as a guide it will be suitable for those who have worked at least 24 months in the profession.

OBJECTIVES

By the end of the course participants will be technically up to date as regards compliance work and the current technical issues likely to affect a typical family company.

CONTENT

- Remuneration packages
- P11D compliance – case study
- Income shifting
- An introduction to succession planning
- Detailed case study including accounts finalisation, deferred tax, capital gains computations and CTSA requirements

NB. Prior knowledge of corporation tax and the calculation of benefits in kind is assumed at this level.

CPD HOURS: 6

Venue	Date	Time
Colchester	3 Nov	09:30-16:30
High Wycombe	26 Oct	09:30-17:15
Leeds	19 Oct	09:30-17:00
London	19 Mar & 16 Apr	09:30-16:30
Manchester	29 Oct	09:30-17:00
Newcastle upon Tyne	21 Oct	09:30-17:00
Oxford	28 Oct	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

General Tax Update for Accounts Staff

WHO SHOULD ATTEND

Audit and accounts staff who have a good working knowledge of the main taxes and who have already attended other Intermediate level courses and wish to be kept up to date with the recent legislative changes. (This course is NOT intended for anyone who has attended the 2010 CPD Finance Act session.)

OBJECTIVES

By the end of the course staff will have been given an overview of recent changes in legislation including a look at some of the more problematic areas.

CONTENT

- Finance Act changes - income / corporation / capital taxes / VAT
- Case study questions will be included throughout the course to illustrate current topical issues

Participants will be expected to have a basic understanding of the main tax rules.

CPD HOURS: 6

Venue	Date	Time
Belfast*	7 Oct	09:30-17:00
Birmingham	14 Sep & 30 Sep	09:30-17:00
Bristol	5 Oct	10:00-17:00
Colchester	29 Sep	09:30-16:30
Exeter	6 Oct	09:30-16:30
High Wycombe	25 Oct	09:30-17:15
Lancaster	21 Sep	09:30-17:00
Leeds	15 Sep	09:30-17:00
Leicester	21 Sep	09:30-17:00
London	17 Sep & 30 Sep	09:30-16:30
Manchester	20 Sep	09:30-17:00
Newcastle upon Tyne	23 Sep	09:30-17:00
Nottingham	13 Sep	09:30-17:00
Oxford	17 Sep	09:30-17:00
Peterborough	28 Sep	09:30-17:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£90 plus VAT per person

Introduction to PAYE and NI

WHO SHOULD ATTEND

This course is suitable for those participants who have little or no experience in this area. As a guideline it will be suitable for those who have worked less than 12 months in the profession.

OBJECTIVES

To familiarise participants with the basics of PAYE and National Insurance using manual preparation of deduction working sheets.

CONTENT

The course will include:

- Scope of PAYE
- Scope of National Insurance
- PAYE compliance
- Case study - month 10 payroll run

CPD HOURS: 3

Venue	Date	Time
Belfast*	24 Sep	09:30-13:00
Birmingham	12 Feb & 17 Sep & 1 Oct	09:30-13:00
Bristol	8 Sep	10:00-13:00
Colchester	1 Oct	09:30-13:00
Exeter	9 Sep	09:30-13:00
High Wycombe	29 Jan & 12 Oct	09:30-13:00
Lancaster	24 Sep	09:30-13:00
Leeds	24 Sep	09:30-13:00
Leicester	5 Feb & 10 Sep	09:30-13:00
London	12 Feb & 10 Sep & 24 Sep	09:30-13:00
Manchester	17 Sep	09:30-13:00
Newcastle upon Tyne	17 Sep	09:30-13:00
Nottingham	17 Sep	09:30-13:00
Oxford	24 Sep	09:30-13:00
Peterborough	24 Sep	09:30-13:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Introduction to VAT

WHO SHOULD ATTEND

This course is suitable for those participants who have little or no experience in this area. As a guideline it is suitable for people who have up to 12 months experience in the profession.

Participants will be expected to be familiar with basic bookkeeping entries.

OBJECTIVES

To familiarise participants with the basic scope of VAT and the bookkeeping entries necessary to record the VAT element of business transactions.

CONTENT

The course will include:

- Scope of VAT
- Accounting for VAT
- The VAT return
- Case study - completion of a VAT return

CPD HOURS: 3

Venue	Date	Time
Belfast*	24 Sep	14:00-17:00
Birmingham	12 Feb & 17 Sep & 1 Oct	14:00-17:00
Bristol	8 Sep	13:30-17:00
Colchester	1 Oct	13:30-16:30
Exeter	9 Sep	13:30-16:30
High Wycombe	29 Jan & 12 Oct	14:00-17:15
Lancaster	24 Sep	14:00-17:00
Leeds	24 Sep	14:00-17:00
Leicester	5 Feb & 10 Sep	14:00-17:00
London	12 Feb & 10 Sep & 24 Sep	13:30-16:30
Manchester	17 Sep	14:00-17:00
Newcastle upon Tyne	17 Sep	14:00-17:00
Nottingham	17 Sep	14:00-17:00
Oxford	24 Sep	14:00-17:00
Peterborough	24 Sep	14:00-17:00
Stirling*	16 Nov	13:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

P11Ds/Benefits

WHO SHOULD ATTEND

This course is suitable for those participants who have attended the introductory session or those who have some knowledge of the basics of P11D completion. As a guideline it will be suitable for those who have worked between 12 and 24 months in the profession or those who have not recently completed P11Ds.

OBJECTIVES

To build on the knowledge gained from the Introduction to Employment Income and Benefits in Kind course and deal with the calculation of a wide range of benefits together with a review of recent developments/changes in practice or the legislation.

CONTENT

- Calculation and treatment of the main benefits eg: company cars, beneficial loans, reimbursed expenses etc
- Administration – review of the paperwork, filing dates, penalties, and dispensations
- Class 1A
- Detailed case study. Participants are given blank P11Ds together with information in respect of various benefits and expenses payments. Participants are asked to complete the P11Ds and prepare schedules showing taxable benefits and expenses claims.

CPD HOURS: 3

Venue	Date	Time
Belfast*	19 Apr	09:30-13:00
Birmingham	24 Mar & 13 Apr	09:30-13:00
Exeter	16 Mar	09:30-13:00
High Wycombe	5 Mar	09:30-13:00
Leicester	5 Mar	09:30-13:00
Nottingham	18 Mar	09:30-13:00
Oxford	3 Mar	09:30-13:00
Peterborough	20 Apr	09:30-13:00
Stirling*	6 May	09:30-13:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Payroll Workshop

WHO SHOULD ATTEND

This course is suitable for those participants who have a reasonable working knowledge of PAYE.

The course deals with PAYE compliance issues and focuses on the computation of SSP, SMP and SPP.

OBJECTIVES

To ensure participants are aware of the rules for calculating SSP and SMP entitlement and other related payroll issues.

CONTENT

- SSP, SMP and SPP - Overview and case studies
- Other related issues
- Recent developments

CPD HOURS: 3

Venue	Date	Time
Belfast*	19 Apr	14:00-17:00
Birmingham	24 Mar & 13 Apr	14:00-17:00
Bristol	15 Mar	13:30-17:00
High Wycombe	5 Mar	14:00-17:15
Leicester	5 Mar	14:00-17:00
Nottingham	18 Mar	14:00-17:00
Peterborough	20 Apr	14:00-17:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Personal Tax 1

WHO SHOULD ATTEND

This course is suitable for those participants who have little or no existing tax knowledge or experience in this area. As a guideline it will be suitable for those who have worked between 3 and 15 months in the profession. It will not normally be suitable for those participants who are studying and have sat their first professional tax exam.

OBJECTIVES

By the end of the course participants will be familiar with the basic principles of calculating an individual's income tax liability.

CONTENT

- Review of the different sources of income
- Determination of tax credits/tax deducted at source
- Tax rates and allowance
- Income tax computations
- Case studies

CPD HOURS: 6

Venue	Date	Time
Belfast*	4 Nov	09:30-17:00
Birmingham	17 Feb & 9 Nov	09:30-17:00
Bristol	4 Feb	10:00-17:00
Colchester	9 Dec	09:30-16:30
Exeter	23 Nov	09:30-16:30
High Wycombe	8 Feb	09:30-17:15
Lancaster	4 Mar	09:30-17:00
Leeds	23 Nov	09:30-17:00
Leicester	2 Dec	09:30-17:00
London	2 Mar & 16 Nov	09:30-16:30
Manchester	9 Dec	09:30-17:00
Newcastle upon Tyne	25 Nov	09:30-17:00
Northampton	1 Dec	09:30-17:00
Nottingham	16 Feb & 15 Nov	09:30-17:00
Oxford	15 Feb	09:30-17:00
Peterborough	4 Feb	09:30-17:00
Stirling*	8 Apr	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£90 plus VAT per person

Personal Tax 2

WHO SHOULD ATTEND

This course will be suitable for those participants who already have a basic working knowledge of personal tax and who wish to extend that knowledge to cover more complex personal tax issues.

This course is NOT suitable for those who have not attended the Personal Tax 1 course.

Relevance will depend upon experience, but as a guideline this course will be more suitable for someone who has been working for between 12 and 24 months.

OBJECTIVES

To look at the tax relief available to an individual for losses, pension contributions, charitable giving and tax efficient investments.

CONTENT

- Property income
- Trading income loss reliefs
- Relief for pension contributions
- Charitable giving
- Tax efficient investments
- Case study questions

CPD HOURS: 3

Venue	Date	Time
Oxford	3 Mar	14:00-17:00

Venue details provided with booking confirmation

£45 plus VAT per person

Personal Tax Case Study

WHO SHOULD ATTEND

This course is suitable for those participants who are experienced in personal tax, including trading profits computations, either by practical experience or by exam training. Generally two years experience in tax will be sufficient.

OBJECTIVES

By the end of the course participants will be technically up to date as regards personal tax compliance. The course will give participants the opportunity to complete self assessment returns for both individuals and partnerships.

CONTENT

There is no formal lecturing on this course as participants will be expected to be familiar with the basic rules. A whole day case study is used to include the following:

- Partnership tax – trading profit computations, the admission of a new partner
- Completion of a tax return
- Detailed income tax and capital gains computations including foreign income dividends and guaranteed income bonds.

CPD HOURS: 6

Venue	Date	Time
Lancaster	28 Oct	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

Tax Issues Arising From Accounts Review

WHO SHOULD ATTEND

Seniors and staff who are responsible for the audit, accounts preparation and draft tax computations. As a guide it will be suitable for those who have worked at least 24 months in the profession.

Participants will therefore need to have experience of company accounts preparation and/or review. The course will deal with taxation issues arising from the preparation and review of accounts.

OBJECTIVES

To enable participants to identify potential tax issues when reviewing a set of accounts.

This course will consider the taxation matters that need to be considered both during the undertaking of the audit and when preparing the draft corporation tax computation.

CONTENT

The course will include :

- A review of corporation tax charging provisions
- Trading income computation considerations
- Capital allowances and recent developments
- Associated companies
- Loans to participators
- National Insurance issues

Case studies may be used where appropriate

Participants will be expected to have a basic understanding of the main tax rules.

CPD HOURS: 3

Venue	Date	Time
Birmingham	25 Mar & 18 Nov	09:30-13:00
Cambridge	2 Nov	09:30-13:00
Exeter	16 Mar	13:30-16:30
Lancaster	27 Oct	09:30-13:00
Leicester	24 Feb	09:30-13:00
Northampton	17 Mar	09:30-13:00
Nottingham	19 Mar	09:30-13:00
Peterborough	21 Apr	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

VAT Healthcheck

WHO SHOULD ATTEND

This course is suitable for those participants who have an understanding of VAT and who would like to be able to give clients assurance on VAT matters. As a guide it will normally be suitable for those participants who have been in practice for between 24 and 36 months. It is not suitable for partners or managers with extensive experience in VAT matters.

OBJECTIVES

The aim of the course is to highlight some of the more problematic areas encountered when carrying out a VAT healthcheck.

CONTENT

- Review VAT administration and procedures
- Review VAT compliance visits
- Review of specific areas including car expenses and the second hand car scheme, entertaining costs, bad debts, credit notes etc
- Case studies to illustrate specific possible VAT traps

CPD HOURS: 3

Venue	Date	Time
Belfast*	8 Oct	14:00-17:00
Bristol	15 Mar	10:00-13:00
Oxford	27 Oct	14:00-17:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

VAT Problem Areas for Accounts Staff

WHO SHOULD ATTEND

This course is suitable for those participants who already have a basic understanding of VAT and would benefit from an understanding of some of the problem areas. As a guideline it will be suitable for those people who have worked between 24 and 36 months in the profession.

OBJECTIVES

To ensure participants are aware of the correct treatment of specific problem areas within VAT as well as some of the recent changes in VAT practice and any relevant changes in the legislation.

CONTENT

- Basic land and property transactions
- Partial exemption
- Capital Goods Scheme
- International trading in goods and services
- Recent developments

Case studies may be used during the session to help illustrate the topics where appropriate.

CPD HOURS: 3

Venue	Date	Time
Birmingham	25 Mar & 18 Nov	14:00-17:00
Bristol	14 Apr	13:30-17:00
Cambridge	2 Nov	14:00-17:00
Colchester	19 Feb	13:30-16:30
High Wycombe	7 Dec	14:00-17:15
Lancaster	27 Oct	14:00-17:00
Leeds	16 Mar	14:00-17:00
Leicester	24 Feb	14:00-17:00
London	18 Mar & 15 Apr	13:30-16:30
Manchester	2 Mar	14:00-17:00
Newcastle upon Tyne	17 Mar	14:00-17:00
Northampton	17 Mar	14:00-17:00
Nottingham	19 Mar	14:00-17:00
Peterborough	21 Apr	14:00-17:00
Stirling*	6 May	13:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Communication: The Essential Skills

WHO SHOULD ATTEND

The course is essential for junior staff who wish to improve their ability to communicate effectively with clients in writing, on the phone or face to face.

The relevance of the course will depend upon the participants' level of experience in this area. As a guide, the course will be most suited to members of staff who have been in the profession for up to 24 months.

OBJECTIVES

At the end of the course participants will be aware of the principles of good communication and the effect of key aspects of their behaviour on working relationships with clients and colleagues. They will have been given practical tools to help them communicate more effectively on the telephone, and will have had the opportunity to try out some of these in role-play situations. Participants will also have seen some examples of good and bad business writing and will have acquired some writing and editing skills.

CONTENT

The course will cover:

- Importance of communication - ways, means and barriers
- Helping and hindering behaviours - group exercises and informal presentations
- Body language basics
- Telephone training tips - role plays
- Business writing skills and techniques

Individual and group exercises will be used to enable participants to practice the key skills learned.

CPD HOURS: 6

Venue	Date	Time
Belfast*	5 Oct	14:00-17:00
Birmingham	23 Feb	09:30-17:00
Bristol	24 Feb	10:00-17:00
Colchester	15 Apr	09:30-16:30
High Wycombe	26 Nov	09:30-17:15
Lancaster	11 Mar	09:30-17:00
Leeds	19 Feb	09:30-17:00
Leicester	26 Feb	09:30-17:00
London	22 Jan & 4 Jun	09:30-16:30
Manchester	19 Feb	09:30-17:00
Newcastle upon Tyne	5 Feb	09:30-17:00
Nottingham	26 Feb	09:30-17:00
Peterborough	26 Mar	09:30-17:00
Stirling*	17 Nov	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£90 plus VAT per person

Effective Business Letter and Report Writing

WHO SHOULD ATTEND

The course is designed for semi-seniors and seniors who are relatively new to business writing and need to improve their written communication skills. More experienced staff may find it a useful refresher of the basics.

OBJECTIVES

At the end of the course participants will have a greater appreciation of the skills required to generate more effective written communication. They will be able to write letters and reports which convey a clear and effective message.

CONTENT

The course will cover:

- Structure, purpose, content and style
- Barriers between reader and writer
- Use of plain English to create appropriate tone and impression
- The ‘golden rules’ of business writing - illustrated by examples
- Other letter forms: e-mail, fax and memo
- Individual and group exercises will be used to enable participants to practice the key skills learned.

CPD HOURS: 3

Venue	Date	Time
Exeter	30 Apr	13:30-16:30

Venue details provided with booking confirmation

£45 plus VAT per person

How to Be an Effective Senior

WHO SHOULD ATTEND

Being able to manage ourselves and our relationships with colleagues and clients are as important as having the appropriate technical skills.

The course is ideal for those about to become or who have recently become seniors and are starting to take responsibility for jobs and other members of staff.

The relevance of the course will depend upon participants’ level of responsibility and practical experience. As a guideline however, it is unlikely to be appropriate for those with less than two years experience in the profession.

OBJECTIVES

At the end of the course participants will be more aware of the importance of managing themselves and others and have gained an insight into how this can be achieved.

CONTENT

The course will cover:

- Examination of the role and skills required of the senior.
- Communication skills – review of the barriers to effective communication and how they can be overcome
- One to one training – introduction to the skills, including the use of the video ‘You’ll Soon Get the Hang of It!’, followed by an exercise whereby participants have the opportunity to put these skills into practice.
- An introduction to time management skills.
- Group skills - use of a management game to illustrate how groups make decisions and how they can be influenced.

CPD HOURS: 6

Venue	Date	Time
Birmingham	20 May & 6 Jul	09:30-17:00
Colchester	19 Nov	09:30-16:30
High Wycombe	12 Jul	09:30-17:15
Lancaster	1 Jul	09:30-17:00
Leeds	25 May	09:30-17:00
Leicester	27 May & 12 Nov	09:30-17:00
London	12 Jan & 27 Apr	09:30-16:30
Manchester	5 May	09:30-17:00
Newcastle upon Tyne	26 May	09:30-17:00
Nottingham	15 Oct	09:30-17:00
Oxford	27 May	09:30-17:00
Peterborough	19 May	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

Keeping Your Clients Happy

WHO SHOULD ATTEND

Managing clients is as important as providing the technical input.

The course is ideal for seniors / managers responsible for a portfolio of clients.

The relevance of the course will depend upon participants level of responsibility and practical experience. As a guideline however, it is unlikely to be appropriate for those with less than three years experience in the profession.

OBJECTIVES

At the end of the course participants will be more aware of the importance of keeping clients happy and have gained an insight into how this can be achieved.

CONTENT

- Consideration of client’s needs and how these can be satisfied. General discussion on the choices clients have and what can influence them to make these choices. ‘How can we persuade them to choose us?’
- Aspects of clients’ expectations and how to manage them
- Consideration of the features and benefits of our products and services
- Group discussion on the importance of first impressions and how these are formed. Use of the ‘Happy Accident’ video to illustrate this
- Dealing with complaints by means of a role play

CPD HOURS: 6

Venue	Date	Time
Oxford	26 May	09:30-17:00

Venue details provided with booking confirmation

£90 plus VAT per person

Successful Job Management

WHO SHOULD ATTEND

This course is aimed at those about to become or who have recently become involved in managing work teams. They should be responsible for the planning of projects and their successful completion.

OBJECTIVES

As a result of this course, participants will have a clear understanding of the processes involved in successfully managing projects.

CONTENT

- Defining the job management process
- Successful v unsuccessful jobs – contributing factors
- The job life cycle – preparation, planning, implementation and review
- Key functions and activities to be carried out
- Managing the human factor

CPD HOURS: 3

Venue	Date	Time
Oxford	22 Apr	14:00-17:00

Venue details provided with booking confirmation

£45 plus VAT per person

Working Effectively Under Pressure

WHO SHOULD ATTEND

This course will provide participants with an introduction to acquiring knowledge and understanding issues and stress in the workplace along with techniques to manage pressure.

The relevance of the course will depend upon participant's practical experience, however, as a guideline, it will be suitable for those who have worked at least 12 to 18 months in the profession.

OBJECTIVES

By the end of the course participants should recognise the causes and effects of pressure. They will learn to develop and adopt appropriate strategies and policies to reduce the detrimental aspects of pressure at work.

CONTENT

- Pressure v stress
- Recognising the symptoms of too much pressure
- Understanding the short and long term effects of stress
- Time management skills to maintain standards of performance
- Effective use of delegation and management techniques
- Physical and mental methodology to reduce internally generated pressure

Case studies and exercises to demonstrate key points and practical applications

CPD HOURS: 3

Venue	Date	Time
Exeter	30 Apr	09:30-13:00

Venue details provided with booking confirmation

£45 plus VAT per person

Getting The Most Out of Excel (2007)

WHO SHOULD ATTEND

Participants should be familiar with the package at least to an introductory level. Good knowledge of the Excel icons and menus is preferred along with some experience of working with formulae. It is assumed that participants will be familiar with Excel '97 or above.

OBJECTIVES

To demonstrate some of the more useful and advanced features of Excel.

CONTENT

- Rounding and cross-casting
- Absolute and mixed cell references
- Data validation
- Lookup commands
- Conditional logic (IF)
- Conditional formatting
- SUMIF command
- Sheet replication
- Protection
- Links to Word
- Range names
- Excel audit tools
- Pivot tables
- Database
- ODBC links
- Concatenation (mixing text and formulae)
- Custom date and number formats

Please note that this is NOT a hands-on course.

CPD HOURS: 3

Venue	Date	Time
Belfast	9 Sep	09:30-13:00

Venue details provided with booking confirmation

£57.50 plus VAT per person

Practical Use of Excel

WHO SHOULD ATTEND

Participants should be familiar with the operation of the package at least up to introductory level, and, with at least 6 months practical experience of using the package on a day to day basis. This experience should include creating spreadsheets from scratch, entering and copying formulae and the use of the standard and formatting toolbars.

Users upgrading from Excel 97, Excel 2000 or Excel XP may also find this course of use. **Please note that there is an alternative course for Office 2007 users. Current version used on this course is Excel 2003.**

OBJECTIVES

This course provides a brief re-cap of the introductory course and then concentrates on some of the more advanced concepts of spreadsheet design and integrity.

The course is designed for the more experienced spreadsheet user who is likely to be involved in setting up and maintaining spreadsheets on behalf of others.

CONTENT

- Refresher – some short cuts and other speed tips
- Best practice
  - Absolute and mixed cells
  - Rounding / precision
  - Range names
  - Conditional logic (IF command)
  - Conditional formatting
  - Data Validation
  - SUMIF command
  - Protection
  - Circ errors
  - Audit Tools
- Database plus Pivot Tables
- Import / export data
- Presentation
  - Custom Headers/Footers
  - Custom number formats

Numbers limited to 12 participants

CPD HOURS: 6

Venue	Date	Time
Birmingham	1 Jul & 8 Nov	09:30-17:00
Northampton	15 Feb	09:30-17:00
Nottingham	22 Jun	09:30-17:00
Peterborough	14 Apr	09:30-17:00
Stirling*	14 Sep	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£120 plus VAT per person

Practical Use of Excel (Office 2007)

WHO SHOULD ATTEND

Participants should be familiar with Excel at least up to introductory level, and, with at least 6 months practical experience of using the package on a day to day basis. This experience should include creating spreadsheets from scratch, entering and copying formulae and the use of the standard and formatting toolbars.

Please note that there is an alternative course for users of Excel 2003 and earlier versions. Current version used on this course is Excel 2007

OBJECTIVES

This course provides a brief re-cap of the introductory course and then concentrates on some of the more advanced concepts of spreadsheet design and integrity.

The course is designed for the more experienced spreadsheet user who is likely to be involved in setting up and maintaining spreadsheets on behalf of others.

CONTENT

- Refresher – some short cuts and other speed tips
- Best practice
  - Absolute and mixed cells
  - Rounding / precision
  - Range names
  - Conditional logic (IF command)
  - Conditional formatting
  - Data Validation
  - SUMIF command
  - Protection
  - Circ errors
  - Audit Tools
- Database plus Pivot Tables
- Import / export data
- Presentation
  - Custom Headers/Footers
  - Custom number formats

Numbers limited to 12 participants

CPD HOURS: 6

Venue	Date	Time
Birmingham	5 Mar	09:30-17:00
Leicester	18 Jun	09:30-17:00

Venue details provided with booking confirmation

£120 plus VAT per person

Sage 50: Set Up and Processing Cycles

WHO SHOULD ATTEND

Participants should be familiar with double-entry principles, although no prior knowledge of an accounts package is necessary.

The course will be of benefit to those who require an operational understanding of the Sage system. In particular, those who will be responsible for setting up and supporting the package for clients.

OBJECTIVES

The key stages involved in setting up and using the Sage 50 system are covered.

The core stages of the processing cycle are also covered including monthly reconciliations and other month end routines.

CONTENT

- Overview of Sage and Sage products
- Key features of Sage 50
- Company set-up and key settings
- Nominal Ledger records and Chart of accounts
- Customer/Supplier records and opening balances
- Posting routines and allocation procedures
- Bank and VAT reconciliations
- Recurring entries and other journals
- Fixed assets register and depreciation
- Month end routines

Numbers limited to 12 participants

CPD HOURS: 6

Venue	Date	Time
Birmingham	11 Jan & 9 Jun & 7 Dec	09:30-17:00
Bristol	21 Sep	10:00-17:00
High Wycombe	24 Mar	09:30-17:15
Leicester	26 Mar	09:30-17:00
Northampton	16 Feb	09:30-17:00
Nottingham	11 Nov	09:30-17:00
Stirling*	3 Feb	09:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£120 plus VAT per person

Sage 50: The Advanced Modules

WHO SHOULD ATTEND

Previous attendance on the Sage Introductory course is preferred. Participants should be familiar with Sage 50 and be reasonably proficient at using the core modules (Customers/Suppliers/Nominal and Financials). Some experience of using Sage in a client environment would also be useful.

As the core ledgers and general navigation are covered on the Introductory course there is an assumed level of knowledge.

The course will be of benefit to those who require an operational understanding of the more advanced modules of the system including the Report Designer. A case study will also be used to examine some of the more common Sage problems.

OBJECTIVES

To provide hands-on training on the latest version of Sage 50 Accounts Professional. The more advanced features of the system will be covered.

The Report Designer session will take up all of the morning session – and will cover both version 12, and (briefly) version 2007.

CONTENT

- New/Upgraded features
- Report Designer
- Client case study (looking at typical problems)
- Export Sage data and Excel Integration
- Overview of Products, Order Processing and Invoicing modules
- Maintenance and Utilities options
- Overview of Project Costing and Foreign Trader modules

Participants may bring along a USB device, if they wish to take copies of the reports written during the course.

Numbers limited to 12 participants

CPD HOURS: 6

Venue	Date	Time
Birmingham	4 Mar & 9 Nov	09:30-17:00
Leicester	17 Jun	09:30-17:00
Nottingham	6 Jul	09:30-17:00
Peterborough	2 Feb	09:30-17:00

Venue details provided with booking confirmation

£120 plus VAT per person

Sage 50 for the Business Adviser

WHO SHOULD ATTEND

Auditors/advisors, with at least 12 months experience, who wish to gain a deeper understanding of the Sage 50 package. Some familiarity with the package would be useful, particularly an understanding of the core ledgers.

OBJECTIVES

This course looks at the Sage 50 package in some detail.

The main objectives are to arm the auditor or adviser with sufficient knowledge to feel comfortable at year-end, or when setting up systems for a client, or when providing support and advice on an ad hoc basic.

CONTENT

- Sage and Sage 50 overview
- Company Settings – performing a healthcheck
- Chart of Accounts Layouts – performing a healthcheck
- Data - integrity checks
- Dealing with returned cheques, write-offs and other corrections
- Creating recurring entries and Skeleton journals
- Month and year-end
- Typical transaction errors
- Using the report designer to interrogate the audit trail
- Excel integration
- Overview of Foreign Trader and Project Costing modules

Please note that this is NOT a hands-on course.

CPD HOURS: 3

Venue	Date	Time
Belfast*	9 Sep	14:00-17:00
Bristol	28 Apr	13:30-17:00
Colchester	26 Feb	13:30-16:30
Exeter	29 Apr	13:30-16:30
High Wycombe	8 Dec	14:00-17:15
Leeds	14 Oct	14:00-17:00
London	20 Oct & 3 Nov	13:30-16:30
Manchester	16 Nov	14:00-17:00
Newcastle upon Tyne	15 Oct	14:00-17:00
Oxford	22 Apr	09:30-13:00

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£45 plus VAT per person

Sage 50 Report Designer

WHO SHOULD ATTEND

Participants should already be familiar with the basic principles of the Sage Report Designer in previous versions of Sage (v.12 or below).

The course is specifically aimed at those who wish to be able to transfer their current Report Design skills to the new Sage 50 Report Design module.

OBJECTIVES

This hands-on half day course is designed for the more experienced Sage user who is likely to be involved in providing assistance to clients in terms of using the Report Designer to either modify any of the existing Sage reports, or create new reports from scratch, using the latest version.

The Sage 50 2010 Report Design module will be used

CONTENT

- Navigating around the new Windows
- File Extensions and File Formats
- Modified Expression and Filter editors
- New Report Design Wizard
- Importing reports from older versions
- New Join editor
- Toolbox and Properties options
- Report Design Projects

Participants may bring along a USB device, if they wish to take copies of the reports written during the course.

Numbers limited to 12 participants

CPD HOURS: 3

Venue	Date	Time
Colchester	26 Feb	09:30-13:00
Exeter	29 Apr	09:30-13:00
High Wycombe	8 Dec	09:30-13:00
Leeds	14 Oct	09:30-13:00
London	20 Oct & 3 Nov	09:30-13:00
Manchester	16 Nov	09:30-13:00
Newcastle upon Tyne	15 Oct	09:30-13:00
Stirling*	13 Sep	13:30-16:30

* Alternative prices apply at these venues
Venue details provided with booking confirmation

£65 plus VAT per person

CPD Season Ticket Programmes

Our flexible season ticket costs just £465* for 10 CPD places with any number of additional places at just £46.50* per place. You can send five people on two courses, one person on ten courses or any other combination that would help you to meet your needs.

Unlike many of our competitors, you don't have to book additional places in blocks. Once you have purchased 10 places, each additional place will cost just £46.50* and can be booked at any time throughout 2010.

You can also mix and match venues – just make sure you tell us what courses you wish to attend and where.

Also as we don't need to know the names of staff attending the courses, places can easily be transferred within your organisation.

For the smaller practitioner, a season ticket for 6 to 9 places can be purchased at a cost of £60 per place.

The following pages list all of the courses available to you using our flexible season ticket. To book on the courses complete the booking form on page 82 or refer to page 80 for a review of all the booking options.

*£690/£57.50 in Northern Ireland.

Aberdeen

Utilising Tax Losses - Corporate and Personal	22 Mar
Business Tax: Problem Areas	22 Apr
Common Accounting Problems	11 May
Inheritance Tax Update	24 May
VAT Update and Problem Areas	29 Jun
Accountancy and Assurance Update	9 Sep
Finance Act 2010	21 Sep
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	13 Oct
Topical Tax Issues	24 Nov
Audit Update	1 Dec

TIMINGS AND VENUE

Aberdeen Football Club,
Pittodrie Stadium,
Pittodrie Street,
Aberdeen AB24 5QH
Tel: 01224 650400

pm: 13:30-16:30

Belfast

Audit Update	am	2 Mar
Accountancy and Assurance Update	pm	2 Mar
Limited Liability Partnerships	am	11 May
Reporting Requirements for Small Companies	pm	11 May
Dealing with HMRC Enquiries under the New Regime	am	19 May
Inheritance Tax Planning including Trusts	pm	19 May
Finance Act 2010	am	9 Sep
Tax Planning for Family Companies	pm	9 Sep
Detecting Fraud and Advising on Preventing Fraud	am	2 Nov
Money Laundering Update	pm	2 Nov
Topical Tax Issues	am	24 Nov
VAT Update and Problem Areas	pm	24 Nov

TIMINGS AND VENUE

Ramada Hotel
117 Miltown Road
Shaws Bridge
Belfast BT8 7XP
Tel: 028 9092 3500

am: 9:30-12:30 pm: 13:45-16:45

Billericay

Red Tape Round Up - Dealing with HMRC	22 Feb
Accountancy and Assurance Update	9 Mar
Audit Update	19 Apr
Corporation Tax Refresher	11 May
Accounting for Properties and the Audit Issues	9 Jun
Capital Taxes - Recent Developments	24 Jun
Improving Personal Productivity and Effectiveness	8 Jul
Finance Act 2010	6 Sep
Common Accounting Problems	28 Sep
Planning to Retain the Wealth of the Elderly	7 Oct
Maximising Profit and Minimising Risk in Smaller Audits	20 Oct
Topical Tax Issues	16 Nov
VAT Update and Problem Areas	2 Dec

TIMINGS AND VENUE

Stock Brook Country Club,
Queens Park Avenue,
Stock, Billericay, Essex CM12 0SP
Tel: 01277 653616

pm: 14:00-17:15

Birmingham

Dealing with HMRC Enquiries under the New Regime	am 25 Feb [2] pm 25 Feb [2]
Laws & Regulations for the Practising Accountant	pm 8 Mar [1]
Audit Update	pm 29 Mar [1]
Tax Implications of Marriage, Cohabitation, Separation and Divorce	am 22 Apr [2] pm 22 Apr [2]
Accountancy and Assurance Update	am 20 May [1] pm 20 May [1]
Tax Planning for Family Companies	am 15 Jun [2] pm 15 Jun [2]
Finance Act 2010	am 13 Sep [1] pm 13 Sep [1]
Practical Auditing Problems and their Solutions	pm 19 Oct [2]
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	am 28 Oct [2] pm 28 Oct [2]
VAT Update and Problem Areas	pm 15 Nov [1]
Topical Tax Issues	am 1 Dec [1] pm 1 Dec [1]
Charities: Current Issues	pm 14 Dec [2]

TIMINGS AND VENUE

[1] Holiday Inn,
Smallbrook, Queensway, Birmingham B5 4EW
Tel: 0870 400 9008

[2] Birmingham City Thistle Hotel
St Chads Queensway, Birmingham B4 6HY
Tel: 0121 236 4211

am: 9:15-12:15 pm: 14:30-17:30

Bracknell

Tax Update - Spring	am	13 Apr
Audit Update	pm	13 Apr
Red Tape Round Up - Dealing with HMRC	am	11 May
Accounting for Properties and the Audit Issues	pm	11 May
Capital Taxes - Recent Developments	am	15 Jun
Corporation Tax Refresher	pm	15 Jun
Accountancy and Assurance Update	am	7 Oct
Finance Act 2010	pm	7 Oct
Common Accounting Problems	am	9 Nov
VAT Update and Problem Areas	pm	9 Nov

TIMINGS AND VENUE

Blue Mountain Golf Centre, Wood Lane,
Binfield, Bracknell, Berkshire RG42 4EX
Tel: 01344 300200

am: 9:30-12:45 pm: 14:00-17:15

Bristol

Topical Tax Issues	am pm	10 Feb 10 Feb
Charities: Current Issues	pm	9 Mar
Obtaining Finance for the Smaller Business	pm	23 Mar
Use of Trusts for Tax Planning	pm	19 Apr
Maximising Profit and Minimising Risk in Smaller Audits	pm	13 May
Accountancy and Assurance Update	am pm	26 May 26 May
Employment Law Update	pm	14 Jun
Finance Act 2010	am pm	14 Sep 14 Sep
Audit Update	pm	4 Oct
Business Tax: Problem Areas	am pm	20 Oct 20 Oct
Improving Personal Productivity and Effectiveness	pm	11 Nov
Capital Taxes Update	pm	24 Nov
The Reporting Requirements of Small Companies	am pm	7 Dec 7 Dec

TIMINGS AND VENUE

The Bristol Golf Club, St Swithins Park,
Blackhorse Hill, Almondsbury BS10 7TQ
Tel: 01454 620000

am: 9:30-12:30 pm: 13:45-16:45

Bury St Edmunds

Managing Risk in the Professional Practice	17 Mar
VAT Update including Healthcheck	19 Apr
Incorporation v Non Incorporation	13 May
Accountancy and Assurance Update	15 Jun
Finance Bill 2010	1 Jul
Common Accounting Problems	22 Sep
Tax Implications of Buying & Selling Private Companies	16 Nov
General Tax Update	29 Nov

TIMINGS AND VENUE

Ravenwood Hall Hotel, Rougham
Bury St Edmunds IP30 9JA
Tel: 01359 270 345

pm: 15:00-18:00

Cambridge

Dealing with HMRC Enquiries under the New Regime	8 Feb [1]
Audit Update	18 Feb [1]
Tax Implications of Marriage, Cohabitation, Separation and Divorce	12 Apr [2]
Accountancy and Assurance Update	29 Apr [1]
Tax Planning for Family Companies	16 Jun [2]
Finance Act 2010	9 Sep [1]
VAT Update and Problem Areas	4 Oct [1]
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	27 Oct [1]
Topical Tax Issues	18 Nov [1]
Charities: Current Issues	2 Dec [2]

TIMINGS AND VENUE

[1] Menzies Cambridge Hotel,
Bar Hill, Cambridge,
Cambridgeshire CB3 8EU
Tel: 01954 249988

[2] University of Cambridge,
Madingley Hall, Madingley, Cambridge,
Cambridgeshire CB23 8AQ
Tel: 01223 746222

pm: 15:00-18:00

Derby

Dealing with HMRC Enquiries under the New Regime	11 Feb [2]
Laws & Regulations for the Practising Accountant	23 Mar [2]
Tax Implications of Marriage, Cohabitation, Separation and Divorce	31 Mar [2]
Accountancy and Assurance Update	14 Apr [1]
Audit Update	27 Apr [2]
Tax Planning for Family Companies	8 Jun [2]
Finance Act 2010	15 Sep [1]
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	25 Oct [2]
Topical Tax Issues	15 Nov [1]
Practical Auditing Problems and their Solutions	23 Nov [2]
VAT Update and Problem Areas	2 Dec [1]
Charities: Current Issues	13 Dec [2]

TIMINGS AND VENUE

[1] Derby County Football Club, Pride Park
Stadium, Wyvern Link Road, Derby DE24 8XL
Tel: 01332 667589

[2] The Riverside Centre, Riverside Court,
Pride Park, Derby DE24 8HY
Tel: 01332 332044

pm: 15:00-18:00

Edinburgh

Practical Auditing Problems and their Solutions	9 Feb
Business Tax: Problem Areas	21 Apr
Common Accounting Problems	12 May
Inheritance Tax Update	25 May
VAT Update and Problem Areas	22 Jun
Accountancy and Assurance Update	6 Sep
Finance Act 2010	22 Sep
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	12 Oct
Topical Tax Issues	25 Nov

TIMINGS AND VENUE

Edinburgh 1st,
18 Holyrood Park Road,
Edinburgh, EH16 5AY.
Tel: 0131 651 2006

pm: 13:30-16:30

Exeter

Topical Tax Issues	4 Feb
Solicitors' Accounts Rules Update	22 Feb
Insolvency Awareness	31 Mar
VAT Update and Problem Areas	20 Apr
Accountancy and Assurance Update	13 May
Incorporation v Non Incorporation	28 Jun
Introduction to Stamp Duty & Stamp Duty Land Tax	14 Jul
Finance Act 2010	9 Sep
Charities: Current Issues	28 Sep
Share Incentive Arrangements for the Smaller Company	13 Oct
Audit Update	10 Nov
Capital Taxes and the Family Company	23 Nov
The Reporting Requirements of Small Companies	6 Dec

TIMINGS AND VENUE

Sandy Park Conference Centre,
Sandy Park Way, Exeter, Devon, EX2 7NN
Tel: 01392 427427

pm: 14:00-17:00

Glasgow

Practical Auditing Problems and their Solutions	11 Feb
Utilising Tax Losses - Corporate and Personal	23 Mar
Business Tax: Problem Areas	20 Apr
Common Accounting Problems	10 May
VAT Update and Problem Areas	23 Jun
Accountancy and Assurance Update	8 Sep
Finance Act 2010	20 Sep
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	11 Oct
Tax Implications of Marriage, Cohabitation, Separation and Divorce	28 Oct
Topical Tax Issues	23 Nov
Audit Update	2 Dec

TIMINGS AND VENUE

The Glynhill Hotel, 169 Paisley Road,
Renfrew PA4 8XB
Tel: 0141 886 5555

pm: 13:30-16:30

Gravesend

Red Tape Round Up - Dealing with HMRC	2 Mar
Accountancy and Assurance Update	29 Mar
Audit Update	21 Apr
Accounting for Properties and the Audit Issues	6 May
Corporation Tax Refresher	14 Jun
Capital Taxes - Recent Developments	23 Jun
Common Accounting Problems	7 Sep
Finance Act 2010	30 Sep
Maximising Profit and Minimising Risk in Smaller Audits	6 Oct
Topical Tax Issues	8 Nov
VAT Update and Problem Areas	23 Nov

TIMINGS AND VENUE

Best Western Manor Hotel, Hever Court Road,
Singlewell, Gravesend, Kent DA12 5UQ
Tel: 01474 353100

pm: 14:00-17:15

Hatfield

Accountancy and Assurance Update	1 Mar
Corporation Tax Refresher	15 Apr
Capital Taxes - Recent Developments	15 Jun
Finance Act 2010	8 Sep
Common Accounting Problems	22 Sep
Maximising Profit and Minimising Risk in Smaller Audits	14 Oct
VAT Update and Problem Areas	11 Nov
Topical Tax Issues	7 Dec

TIMINGS AND VENUE

Hatfield Oak Hotel
Roehyde Way, Hatfield AL10 9AF
Telephone: 01707 275701

pm: 14:00-17:15

High Wycombe

Red Tape Round Up - Dealing with HMRC	pm	1 Mar
Accountancy and Assurance Update	pm	10 Mar
Audit and Accountancy Update	pm	19 Apr
Audit Update	pm	29 Apr
Accounting for Properties and the Audit Issues	pm	4 May
Tax Update - Spring	am pm	26 May 13 Jul
Corporation Tax Refresher	pm	26 May
Capital Taxes - Recent Developments	pm	22 Jun
Improving Personal Productivity and Effectiveness	pm	6 Jul
Audit and Accountancy Update	am	8 Sep
Common Accounting Problems	pm	8 Sep
Finance Act 2010	am pm	21 Sep 21 Sep
Maximising Profit and Minimising Risk in Smaller Audits	pm	4 Oct
Tax Update - Autumn	am pm	25 Oct 25 Oct
Topical Tax Issues	pm	17 Nov
Accountancy and Assurance Update	pm	25 Nov
Planning to Retain the Wealth of the Elderly	pm	7 Dec
VAT Update and Problem Areas	pm	13 Dec

TIMINGS AND VENUE

Adams Park Conference Centre,
Wycombe Wanderers Football Club,
Hillbottom Road, Sands,
High Wycombe HP12 4HJ
Tel: 01494 472100

am: 9:30-12:45 pm: 14:00-17:15

Ipswich

Red Tape Round Up - Dealing with HMRC	am pm	9 Mar 9 Mar
Accountancy and Assurance Update	am pm	24 Mar 24 Mar
Audit Update	pm	20 Apr
Capital Taxes - Recent Developments	am pm	9 Jun 9 Jun
Corporation Tax Refresher	am pm	30 Jun 30 Jun
Common Accounting Problems	am pm	8 Sep 8 Sep
Finance Act 2010	am pm	28 Sep 28 Sep
Maximising Profit and Minimising Risk in Smaller Audits	pm	11 Oct
Topical Tax Issues	am pm	9 Nov 9 Nov
VAT Update and Problem Areas	am pm	8 Dec 8 Dec

TIMINGS AND VENUE

Holiday Inn Ipswich, London Road
Ipswich, Suffolk IP2 0UA
Tel: 08704 009 045

am: 9:30-12:45 pm: 14:00-17:15

Lancaster

PAYE, Benefits and NI Update	10 Feb
Accountancy & Assurance Update	16 Mar
VAT Update and Problem Areas	27 Apr
Employment Law Update	27 May
Corporation Tax Refresher	14 Jun
Limited Liability Partnerships	29 Jun
Finance Act 2010	14 Sep
Taxation of Property Transactions	19 Oct
Audit Update	9 Nov
Topical Tax Issues	30 Nov
Delivering Quality Client Service	2 Dec

TIMINGS AND VENUE

Scarthwaite Country House Hotel,
Crook-O-Lune, Caton, Nr Lancaster, LA2 9HR
Tel: 01524 770267

pm: 14:00-17:00

Leeds/Garforth

Red Tape Round Up - Dealing with HMRC	17 Feb
Accountancy and Assurance Update	8 Mar
Corporation Tax Refresher	17 May
Capital Taxes - Recent Developments	22 Jun
Finance Act 2010	7 Sep
Common Accounting Problems	21 Sep
Maximising Profit and Minimising Risk in Smaller Audits	5 Oct
Topical Tax Issues	10 Nov
VAT Update and Problem Areas	24 Nov

TIMINGS AND VENUE

Holiday Inn
Leeds/Garforth, Wakefield Road
Garforth, Leeds LS25 1LH
Tel: 0113 286 6556

pm: 14:00-17:15

Leicester

Audit Update	am 17 Feb [3] pm 30 Mar [1]
Dealing with HMRC Enquiries under the New Regime	am 24 Feb [1] pm 2 Mar [3]
Tax Implications of Marriage, Cohabitation, Separation and Divorce	pm 11 Mar [2] am 14 Apr [3]
Laws & Regulations for the Practising Accountant	am 17 Mar [2]
Accountancy and Assurance Update	am 13 Apr [1] pm 13 Apr [1] pm 21 Apr [2]
Tax Planning for Family Companies	pm 19 May [3] am 9 Jun [2]
Finance Act 2010	am 14 Sep [1] pm 14 Sep [1] am 22 Sep [3]
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	pm 28 Sep [2] am 26 Oct [3]
VAT Update and Problem Areas	pm 11 Oct [1] pm 24 Nov [3]
Practical Auditing Problems and their Solutions	am 10 Nov [2]
Topical Tax Issues	am 16 Nov [3] am 7 Dec [1] pm 7 Dec [1]
Charities: Current Issues	pm 1 Dec [2]

TIMINGS AND VENUE

[1] Leicester City Football Club,
The Walkers Stadium, Filbert Way,
Leicester LE2 7FL
Tel: 0870 040 6000

[2] Leicester Tigers, Aylestone Road,
Leicester LE2 7TR
Tel: 0844 856 1880

[3] Best Western Stage Hotel
299 Leicester Road
Wigston Fields
Leicester LE18 1JW
Tel: 0116 288 6161

am: 9:15-12:15 pm: 14:00-17:00

London

Red Tape Round Up - Dealing with HMRC	am pm	4 Mar 4 Mar
Accountancy and Assurance Update	am pm	30 Mar 30 Mar
Audit Update	am pm	13 Apr 13 Apr
Corporation Tax Refresher	am pm	27 May 27 May
Accounting for Properties and the Audit Issues	am pm	8 Jun 8 Jun
Capital Taxes - Recent Developments	am pm	17 Jun 17 Jun
Improving Personal Productivity and Effectiveness	pm	29 Jun
Common Accounting Problems	am pm	9 Sep 9 Sep
Finance Act 2010	am pm	23 Sep 23 Sep
Planning to Retain the Wealth of the Elderly	pm	14 Oct
Maximising Profit and Minimising Risk in Smaller Audits	am pm	25 Oct 25 Oct
Topical Tax Issues	am pm	11 Nov 11 Nov
VAT Update and Problem Areas	am pm	14 Dec 14 Dec

Londonderry

Audit Update	am	1 Mar
Accountancy and Assurance Update	pm	1 Mar
Limited Liability Partnerships	am	10 May
Reporting Requirements for Small Companies	pm	10 May
Dealing with HMRC Enquiries under the New Regime	am	18 May
Inheritance Tax Planning including Trusts	pm	18 May
Finance Act 2010	am	8 Sep
Tax Planning for Family Companies	pm	8 Sep
Detecting Fraud and Advising on Preventing Fraud	am	1 Nov
Money Laundering Update	pm	1 Nov
Topical Tax Issues	am	23 Nov
VAT Update and Problem Areas	pm	23 Nov

Manchester

Red Tape Round Up - Dealing with HMRC	25 Feb
Accountancy and Assurance Update	9 Mar
Corporation Tax Refresher	13 Apr
Audit Update	5 May
Accounting for Properties and the Audit Issues	17 May
Capital Taxes - Recent Developments	16 Jun
Finance Act 2010	6 Sep
Common Accounting Problems	12 Oct
Maximising Profit and Minimising Risk in Smaller Audits	26 Oct
VAT Update and Problem Areas	25 Nov
Topical Tax Issues	8 Dec

TIMINGS AND VENUE

Grand Connaught Rooms,
Great Queen Street,
Covent Garden, London WC2B 5DA
Tel: 0207 405 7811

am: 9:30-12:45 pm: 14:00-17:15

TIMINGS AND VENUE

City Hotel, Queens Quay
Londonderry BT48 7AS
Tel: 028 7127 8690

am: 9:30-12:30 pm: 13:45-16:45

TIMINGS AND VENUE

Haydock Park Racecourse, Lodge Lane,
Newton Le Willows, Merseyside, WA12 0HQ
Tel: 01942 725963

pm: 14:00-17:15

Milton Keynes

Red Tape Round Up - Dealing with HMRC	16 Feb
Accountancy and Assurance Update	3 Mar
Audit Update	26 Apr
Corporation Tax Refresher	23 Jun
Capital Taxes - Recent Developments	1 Jul
Finance Act 2010	14 Sep
Common Accounting Problems	7 Oct
Maximising Profit and Minimising Risk in Smaller Audits	21 Oct
Topical Tax Issues	16 Nov
VAT Update and Problem Areas	29 Nov

TIMINGS AND VENUE

Milton Keynes Dons Football Club
Stadium Way West, Milton Keynes MK1 1ST
Tel: 01908 364183

pm: 14:00-17:15

Newbury

Red Tape Round Up - Dealing with HMRC	3 Mar
Audit Update	27 Apr
Corporation Tax Refresher	13 May
VAT Update and Problem Areas	17 Jun
Capital Taxes - Recent Developments	28 Jun
Finance Act 2010	13 Sep
Common Accounting Problems	30 Sep
Maximising Profit and Minimising Risk in Smaller Audits	13 Oct
Accountancy and Assurance Update	15 Nov
Topical Tax Issues	6 Dec

TIMINGS AND VENUE

Newbury Rugby Club, Monks Lane,
Newbury, Berks RG14 7RW
Tel: 01635 40103

pm: 14:00-17:15

Newcastle

Red Tape Round Up - Dealing with HMRC	18 Feb
Accountancy and Assurance Update	18 Mar
Audit Update	15 Apr
Accounting for Properties and the Audit Issues	26 May
Corporation Tax Refresher	8 Jun
Capital Taxes - Recent Developments	23 Jun
Finance Act 2010	16 Sep
Common Accounting Problems	6 Oct
Maximising Profit and Minimising Risk in Smaller Audits	18 Oct
Topical Tax Issues	18 Nov
VAT Update and Problem Areas	9 Dec

TIMINGS AND VENUE

Newcastle Marriott Hotel, Metro Centre
Gateshead, Tyne & Wear, NE11 9XF
Tel: 0191 493 2233

pm: 15:30-18:30

Northampton

Audit Update	pm pm	17 Feb[1] 26 Apr[2]
Dealing with HMRC Enquiries under the New Regime	pm am	24 Feb[1] 9 Mar[2]
Laws & Regulations for the Practising Accountant	am	1 Mar[1]
Tax Implications of Marriage, Cohabitation, Separation and Divorce	am pm	17 Mar[2] 14 Apr[1]
Accountancy and Assurance Update	am pm	28 Apr[1] 17 May[2]
Tax Planning for Family Companies	am pm	26 May[1] 29 Jun[2]
Finance Act 2010	am pm	7 Sep[2] 22 Sep[1]
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	pm pm	27 Sep[2] 26 Oct[1]
VAT Update and Problem Areas	pm pm	13 Oct[1] 23 Nov[2]
Practical Auditing Problems and their Solutions	am	11 Nov[1]
Topical Tax Issues	pm pm	16 Nov[1] 6 Dec[2]
Charities: Current Issues	am	30 Nov[2]

TIMINGS AND VENUE

[1] The Diamond Centre, Nene Park,
Irthlingborough, Northants NN9 5QF
Tel: 01933 652000

[2] St George's Banqueting and Conference
Centre, Freemasons' Hall,
St George's Avenue,
Northampton NN2 6JA
Tel: 01604 714673

am: 9:15-12:15 pm: 14:30-17:30

Norwich

Red Tape Round Up - Dealing with HMRC	8 Mar
Accountancy and Assurance Update	23 Mar
Audit Update	22 Apr
Accounting for Properties and the Audit Issues	20 May
Capital Taxes - Recent Developments	7 Jun
Corporation Tax Refresher	29 Jun
Finance Act 2010	8 Sep
Common Accounting Problems	23 Sep
Maximising Profit and Minimising Risk in Smaller Audits	13 Oct
Planning to Retain the Wealth of the Elderly	1 Nov
Topical Tax Issues	15 Nov
VAT Update and Problem Areas	7 Dec

TIMINGS AND VENUE

Holiday Inn, Norwich North.
Cromer Road, Norwich NR6 6JA
Tel: 01603 201125

pm: 13:30-16:45

Nottingham

Dealing with HMRC Enquiries under the New Regime	am pm	11 Feb[2] 8 Mar[1]
Audit Update	am pm	16 Feb[2] 31 Mar[1]
Tax Implications of Marriage, Cohabitation, Separation and Divorce	pm am	18 Mar[1] 20 Apr[2]
Laws & Regulations for the Practising Accountant	am	24 Mar[2]
Accountancy and Assurance Update	am pm	12 May[1] 18 May[2]
Tax Planning for Family Companies	am pm	8 Jun[2] 23 Jun[1]
Finance Act 2010	am pm	8 Sep[1] 20 Sep[2]
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	am pm	29 Sep[2] 12 Oct[1]
VAT Update and Problem Areas	pm pm	27 Oct[2] 30 Nov[1]
Practical Auditing Problems and their Solutions	am	4 Nov[1]
Topical Tax Issues	pm pm	17 Nov[1] 22 Nov[2]
Charities: Current Issues	pm	7 Dec[2]

TIMINGS AND VENUE

[1] Nottingham Racecourse,
Colwick Park, Nottingham NG2 4BE
Tel: 0115 958 0620

[2] Village Hotel & Leisure Club,
Brailsford Way, Chilwell Meadows, Beeston,
Nottingham NG9 6DL
Tel: 0115 946 4422

am: 9:15-12:15 pm: 14:00-17:00

Oxford

Planning to Retain the Wealth of the Elderly	3 Feb
Preparing and Implementing a Business Sale and Exit	10 Feb
Detecting Fraud and Advising on Preventing Fraud	18 Feb 2 Mar
Accountancy and Assurance Update	16 Mar 15 Apr
Adding Value to Audits	28 Apr 20 May
UK Tax Issues for Non Domicled Individuals	27 May
Tax Update and Budget Round Up	8 Jun 23 Jun
Finance Act 2010	16 Sep 28 Sep
Use of Trusts for Tax Planning	18 Oct
Audit Update	11 Nov 24 Nov
Topical Tax Issues	2 Dec 9 Dec

TIMINGS AND VENUE

The Oxford Centre, 333 Banbury Road,
Summertown, Oxford OX2 7PL
Tel: 01865 554 719

pm: 15:30-18:30

Peterborough

Dealing with HMRC Enquiries under the New Regime	4 Mar
Laws & Regulations for the Practising Accountant	15 Mar
Tax Implications of Marriage, Cohabitation, Separation and Divorce	29 Mar
Audit Update	19 Apr
Accountancy and Assurance Update	10 May
Tax Planning for Family Companies	24 Jun
Finance Act 2010	20 Sep
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	30 Sep
Practical Auditing Problems and their Solutions	28 Oct
VAT Update and Problem Areas	11 Nov
Topical Tax Issues	29 Nov

TIMINGS AND VENUE

Holiday Inn, Thorpe Wood,
Peterborough PE3 6SG
Tel: 01733 289988

pm: 15:00-18:00

Southend

Accountancy and Assurance Update	2 Mar
Corporation Tax Refresher	20 Apr
Capital Taxes - Recent Developments	30 Jun
Finance Act 2010	27 Sep
Common Accounting Problems	14 Oct
VAT Update and Problem Areas	30 Nov
Topical Tax Issues	14 Dec

TIMINGS AND VENUE

Essex County Hotel Southend, Aviation Way
Southend-on-Sea, Essex SS2 6UN
Tel: 01702 279955

pm: 14:00-17:15

Stirling

Common Accounting Problems	pm	13 May
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	am	7 Sep
Accountancy and Assurance Update	pm	7 Sep
Finance Act 2010	pm	23 Sep
Topical Tax Issues	pm	22 Nov

TIMINGS AND VENUE

Royal Hotel,
55 Henderson Street, Bridge of Allan,
Stirling FK9 4HG
Tel: 01786 832284

am: 9:30-12:30 pm: 13:30-16:30

Sudbury

Utilising Tax Losses - Corporate and Personal	9 Feb
Audit Update	28 Oct

TIMINGS AND VENUE

The Bull Hotel, Hall Street,
Long Melford, Sudbury, CO10 9JG
Tel: 01787 378 494

pm: 15:00-18:00

Tunbridge Wells

Red Tape Round Up - Dealing with HMRC	8 Feb
Accountancy and Assurance Update	22 Mar
Audit Update	26 Apr
Corporation Tax Refresher	25 May
Capital Taxes - Recent Developments	14 Jun
Finance Act 2010	6 Sep
Common Accounting Problems	20 Sep
Maximising Profit and Minimising Risk in Smaller Audits	12 Oct
VAT Update and Problem Areas	22 Nov
Topical Tax Issues	13 Dec

TIMINGS AND VENUE

The Spa Hotel, Mount Ephraim
Tunbridge Wells, Kent TN4 8XJ
Tel: 01892 520331

pm: 14:00-17:15

Watford

Red Tape Round Up - Dealing with HMRC	15 Feb
Accountancy and Assurance Update	4 Mar
Audit Update	21 Apr
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Maximising Profit and Minimising Risk in Smaller Audits	14 Oct
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Topical Tax Issues	9 Dec

TIMINGS AND VENUE

Ramada Jarvis Watford, A41 Watford By-Pass
Watford, Hertfordshire WD25 8JH
Tel: 0208 901 0000

pm: 14:00-17:15

West Bromwich

Audit Update	am pm	11 Feb 11 Feb
Dealing with HMRC Enquiries under the New Regime	am pm	3 Mar 3 Mar
Laws & Regulations for the Practising Accountant	am pm	18 Mar 18 Mar
Tax Implications of Marriage, Cohabitation, Separation and Divorce	am pm	15 Apr 15 Apr
Accountancy and Assurance Update	am pm	11 May 11 May
Tax Planning for Family Companies	am pm	30 Jun 30 Jun
Finance Act 2010	am pm	21 Sep 21 Sep
The Taxation, Legal & Accounting Implications of Transactions between a Company and its Directors	am pm	11 Oct 11 Oct
VAT Update and Problem Areas	am pm	20 Oct 20 Oct
Practical Auditing Problems and their Solutions	pm	8 Nov
Topical Tax Issues	am pm	23 Nov 23 Nov
Charities: Current Issues	pm	9 Dec

TIMINGS AND VENUE

Park Inn West Bromwich
Birmingham Road, West Bromwich,
West Midlands B70 6RS
Tel: 0121 609 9988

am: 9:15-12:15 pm: 14:30-17:30

York

Accountancy and Assurance Update	17 Mar
Audit Update	14 Apr
Accounting for Properties and the Audit Issues	25 May
Corporation Tax Refresher	7 Jun
Improving Personal Productivity and Effectiveness	24 Jun
Finance Act 2010	15 Sep
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TIMINGS AND VENUE

Yorkshire Air Museum, Halifax Way,
Elvington, York YO41 4AU
Tel: 01904 608595

pm: 14:00-17:15

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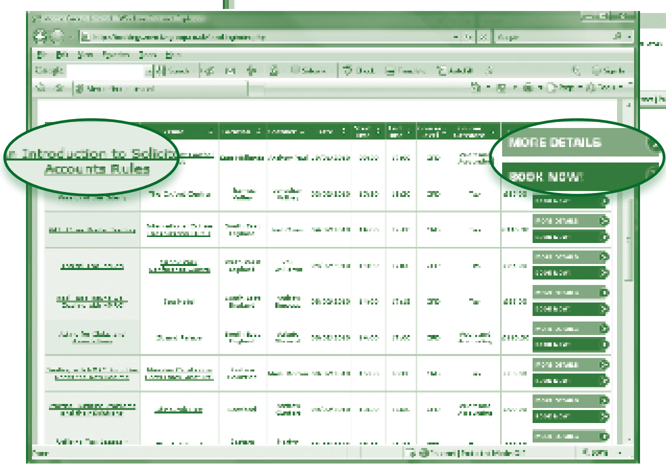

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Norman Allison FCCA
Norman has recently rejoined Mercia after an absence of 12 years. During this time he was at H&R Block Inc for nearly 10 years dealing with the tax affairs of a wide range of clients and managing a national project with Barclays Bank as well as presenting throughout Eastern Europe. In the last two years he was a Senior Tax Manager at Target in the heart of the City of London dealing with the tax affairs for a number of High Net Worth clients.

Simon Birkett MA(Oxon) FCA ATII
Simon joined The Professional Training Partnership in 1993 having previously worked in the training department of several international accountancy practices. He lectures extensively on CPD courses and is widely respected by audiences for the breadth of his technical knowledge. He is joint author of the ICAEW's Tax Digest on Pay and File and edits the monthly publication Professional Tax Update.

Alan Bonham MA FCA
Since qualifying as a Chartered Accountant, most of Alan's time has been spent training others. He was a Director at Anderson's Tutors Limited where he prepared students for ICAEW exams. From there, he joined Neville Russell where he became training manager. He then spent 16 years as a freelance lecturer and training consultant specialising in audit and accounting topics. Alan was Managing Director of Pentagon Training Ltd but is now working again as a freelance lecturer.

Andrew Burgess MA
Andrew joined Mercia in 2003 as an experienced tax lecturer and consultant. After 14 years with the Revenue, Andrew joined Neville Russell, which became Mazars following the merger in 1998. At the time of leaving he was senior tax partner in the firm and had overall responsibility for the running of the personal tax department. His expertise lies in the areas of employment taxation, investigation work, charity tax and personal tax planning.

David Craddock
David has over 18 years experience in the practice of reward management and, in particular, employee share scheme arrangements. David has successfully established share schemes and employee benefit arrangements in several continents as well as in the UK and is recognised as a major contributor to the debate on employee share ownership around the world. David contributes regularly to conferences and seminars all over the world and is the author of a series of papers on employee share ownership.

Jane Everingham BSc ACA
Jane became Managing Director of Mercia Group Ltd in July 2007 having been on the Board for the last seven years. Whilst Jane now spends the majority of her time managing and developing the business, she continues to lecture on selected audit and accountancy courses. Before moving onwards and upwards Jane was responsible for Mercia's wide range of technical products and services.

Ian Fletcher BA ACA
Ian is a well known lecturer and business consultant who has gained a reputation for his entertaining style and practical approach to practice management issues. He specialises in practice management and particularly the systemisation of accounting practices, motivation of staff and profit improvement techniques. Qualified as an independent financial advisor with the Chartered Insurance Institute, he also advises firms on how to take advantage of financial services opportunities.

Phil Frost BA ACA
Phil started lecturing in 1983 having qualified with Coopers & Lybrand in his home town, Sheffield. He was the midlands regional director of Financial Training before joining Mercia in 2001. He lectures to the accounting profession and to those in industry and commerce on accounting, auditing, and related legal and regulatory topics as well as specialising in charity and property accounting and international accounting standards.

David Gallagher BA ACA
David is a senior audit and accounts consultant within the Mercia Team and and has become one of our charity specialists. He qualified with Grant Thornton in Leicester where he had his first experience of lecturing. His role at Mercia includes lecturing, conducting file reviews, answering technical queries, responsibility for the Mercia Audit Manual and editing the charities section of the Mercia Specialist Assignments Manual.

Tim Good (BA) Oxon ACA
Tim founded The Professional Training Group in 1990 and continues to lecture to professional audiences all over the country. He has the ability to make even the most obscure tax point clear and the most mundane topic entertaining and informative.

Mike Griffiths
Mike is a former university lecturer who now spends practically all his working time speaking on the CPD circuit to accountants and solicitors. He is the co-editor of Loose on Liquidators and Loose on the Company Director, two major practitioner works. He is also the author of Insolvency of Individuals and Partnerships and of Corporate Insolvency for the General Practitioner and a regular contributor to legal and accountancy periodicals.

Andrew Güntert MSc FCA
Andrew specialises in auditing, financial reporting and associated areas and has been delivering CPD lectures for some years. He was with ATC before joining Mercia. He has a strong interest in technical issues, writing regularly for the specialist press and is an active member of the ICAEW's Audit and Assurance faculty serving on several committees including the Technical and Practical Auditing Committee.

Sally Hutchings BSc ACA
Sally trained and qualified with Deloitte & Touche, before joining Mercia in 1992 as a member of the audit and accounts team. Sally's role includes presenting audit and personal development courses and providing technical support and peer review services.

Simone Hurst
Simone started out as a VAT Inspector with HM Customs and Excise (as it was then) before taking a break from VAT completely; assisting her parents in their service line businesses. Simone fell back into the VAT fold and ran an in-house VAT department at an accountancy practice before moving over to Ernst & Young. After a few years, she took over an independent VAT Consultancy called VATease, running the company for the next 10 years before joining BTG Tax with the rest of the VATease team in September 2008.

Martyn Ingles BSc FCA CTA
For ten years Martyn worked for Financial Training lecturing in taxation and other accounting subjects. On his return to professional practice in 1997 Martyn joined Horwath Clark Whitehill, and became a partner in October 1998 and in 2000, he moved to MacIntyre Hudson LLP. His main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring.

Robert Jamieson MA FCA CTA (Fellow)
Robert is a tax partner with Mercer & Hole, with over 30 years' experience in tax training. He spent 20 years with Financial Training, being responsible for their specialist tax course and consultancy division. He now combines his practice work with his regular speaking commitments. He is also on the editorial board of 'Taxation' and a commentator for Legal Network Television.

Darren Leiser FCCA
Darren joined Mercia in January 2009 as an experienced lecturer. Having qualified in 1998, Darren has spent the last 10 years working in the profession, most recently with MacIntyre Hudson. As a manager in their technical department his role included presenting courses, conducting hot and cold file reviews and dealing with technical queries. He has a very similar role at Mercia.

Mark Morton BA CA ATT
Mark joined HMRC in 1989 and undertook their full training exams. In 1996 he was made Deputy District Inspector for the Derby area and had detailed experience of all types of Revenue enquiries. Mark joined Mercia as an experienced lecturer and now provides a wide variety of CPD training around the country. He is also a well known contributor to professional publications and provides technical consultancy to the accountancy profession.

Giles Mooney BSc (Hons) ACA CTA
Giles joined PTP in January 2004 and became a partner of The Professional Training Partnership in January 2007. He started his career with a small firm of accountants and tax advisers, before working as a director of a large professional training company. He has now been involved in UK tax training for 9 years.

Pat Nown ACA CTA ATT
Pat joined Mercia in 2008 as a tax lecturer bringing a wealth of experience with her. She worked for many years with FTC Kaplan where she was Tax Product Director for the Midlands and has been a tax lecturer for many years both for exam based training and for the profession in general. Pat also continues to be actively involved in the Association of Taxation Technicians, where until recently she served as a council member for twelve years.

Neil Owen
Neil is a freelance speaker and writer. He has almost 20 years involvement in VAT, having worked for 6 years for HMCE, and then for 12 years with a firm of Chartered Accountants in the Thames Valley, where he was VAT Director until August 2002. Neil is also a consultant with Southern VAT, providing advice on a wide range of topics to businesses of all sizes. He also regularly provides consultancy advice to other professionals such as solicitors and accountants.

Andrew Paul ACA
Andrew trained and qualified with Bishop Fleming in Truro and has been with Mercia since 1999. He is a lecturer on both our professional development audit and accounts courses and the full range of IT courses. He is also involved in assisting clients with technical queries (both audit and accounts and IT) and is part of the audit peer review team.

Mike Rees
Mike worked at Deloitte & Touche as an IT consultant before joining Mercia more than 15 years ago. At Mercia Mike divides his time between providing IT training and support to accountancy practices and also advising them of the IT systems they need in place to take advantage of the technological age.

John Selwood ACA
John is a chartered accountant and independent training consultant. He lectures on money laundering, auditing and financial reporting. He also writes technical material for publishers. Previously, he has been the technical partner for a top thirty firm of accountants and head of CharterGroup the accountancy network. John is also finance director of Passion of the Planet Ltd, a group of digital radio broadcasting companies.

John Sharkey BA(Econ) ACA
John is Director of Mercia's Management Training Division and specialises in management and personal skills training for accountants in practice. He joined the Mercia lecturing team in 1998, having previously worked as Managing Director of a training consortium looking after the training and technical needs of independent accountancy practices. His presentations are renowned for their energy, enthusiasm and practical relevance and for challenging participants.

Nigel Smith FCA FCCA
After qualifying Nigel joined Coopers and Lybrand as a training manager and has been involved in training since then. FMTC (The Financial & Management Training Consultancy) was established by Nigel in 1982. It has a wide range of clients in industry, commerce, the professions and the Civil Service. It specialises in practical courses designed to relate totally to the needs of the client organisation and the individual course participants.

Val Steward FCA
Val Steward is a Chartered Accountant who has spent the last 20 years working with accounting practices, helping them to develop their businesses and remain compliant. As well as working directly with practices, she has extensive experience producing practical guidance and documentation for the use of accountants in practice.

Christine Taylor ACA
Christine joined BRAINS, now a division of Mercia, in 1991 and since that time has been responsible for presenting a wide variety of professional development courses. Her role also includes providing technical support and student advice.

Debbie Taylor BA(Hons) CIPD
Having studied languages at Durham University Debbie spent 18 years with a major UK bank including twelve months in Paris setting up an internal audit department. She then moved to the accounting profession working for Lathams and Mercia before joining Target as their HR director.

Jim Thomas
Jim has been a management and training consultant for over 5 years and in that time has worked with many firms within the professional services sector, particularly in accountancy and law. He has a significant breadth of commercial and people expertise, with a healthy mix of learned knowledge and experience gained from performing at a senior level in a highly competitive business environment.

Bob Trunchion MSC FCA ATII TEP
Bob is a partner with MacIntyre Hudson. He qualified as a chartered accountant with Coopers & Lybrand where he specialised in corporate taxes. He has a wide range of tax knowledge and is also a specialist in a number of industries or niche markets such as solicitors, farmers and the medical profession. Bob is a major technical contributor for Legal Network Television and ATC's Tax TV. He continues to be involved with clients on both a consultancy and portfolio basis.

Mike Ulrich
Mike Ulrich was training director with a top twenty firm before becoming a freelance lecturer some years ago. He also runs his own practice and provides consultancy to other practitioners on audit and financial reporting issues. He has built up particular expertise in pensions, charities and solicitors' accounts rules.

Mark Ward LLB CTA
Mark qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium size firm. Since 1993, he has been lecturing on a wide variety of tax matters to both students and qualified practitioners. Mark was admitted as a partner of the Professional Training Partnership in January 1999 and is a Director of PTP Ltd.

John Welsford FCA
John joined Mercia in 1982 and as Managing Director of the company he built Mercia into one of the leading service providers to the accountancy profession with over 4000 clients and 50 members of staff. Whilst he has now handed over his management responsibilities he continues to lecture extensively on Mercia courses and for other organisations.

Andrew Whittaker
Andrew is a training consultant and executive coach. After a varied career which has included the armed forces, sales, corporate account management and corporate training, Andrew is able to use much 'real life' experience in his work. Andrew is a certified trainer in the art and science of Neuro-Linguistic Programming (NLP), a master of Time Line Therapy and a qualified hypnotist. His specialisms are those areas which require effective communication with, and the influencing of, others.

Jonathan Wilkey
Jonathan is a solicitor, lecturer and training consultant who has developed a specialisation in law and the elderly, in particular with regard to community care legislation. Jonathan lectures nationally on these matters to accountants and financial advisers. He is also a regular writer and is often asked to appear on radio and television. Jonathan is currently co-editing a loose-leaf manual on law and the elderly for accountants.

Phil Williams BA FCA ATII
Phil is a senior tax consultant within the Mercia team. Since qualifying Phil has spent most of his time in tax but has also been involved in many other areas. He is a popular speaker on Mercia CPD courses and a regular contributor to the Mercia tax consultancy service where his extensive knowledge and experience is well recognised.

Dean Wootten FCA CTA
Dean is a director of Online Tutors Limited and has been involved in tax training since 1994. He lectures extensively on the CPD circuit on a wide variety of tax topics. Dean was previously a tax partner in a provincial practice and this helps him to ensure that his presentations are of particular relevance to practitioners.

Jim Yuill
Jim specialises in worldwide social security matters with particular emphasis on contributions. He spent more than 20 years in the UK Department of Social Security and more recently 14 years as Director of Social Security Services with one of the Big 4 accountancy firms. He now runs his own social security consultancy business and divides his time between lecturing, writing and advising companies on how to minimise contribution liabilities.

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Administration Details

- After processing your course booking we will send you an email to confirm the places we have reserved on your behalf. If you have not received confirmation within 10 days of making your booking please call us to make sure your booking has been received.
- Where appropriate an invoice will be sent covering the course fee. Our normal trading terms apply to this invoice.
- Joining instructions will be sent by email to our enrolment or main contact 10 days before the date of the course. These will include venue directions and should be forwarded on to those attending the course.
- Places are limited on all courses. Places are allocated on a strict first come, first served basis.
- If you wish to transfer and attend an alternative venue, 7 working days' notice must be given in writing. When shorter notice is given, Mercia reserves the right to charge a £25 administrative fee or refuse the request.
- Refunds will be subject to a 20% administrative charge. Where notice of cancellation is received less than 14 days prior to the course on which you have booked a place, no refund will be made.
- Tea, coffee and biscuits are provided during morning and afternoon breaks of all CPD courses.
- The course fee does not include lunch, except where shown or indicated on the joining instructions.
- Course documentation can only be provided to those who book to attend the course concerned. Where the course is presented by a Mercia member of staff, copies of the course notes can be purchased.
- We reserve the right to cancel, or make changes to, any course shown without prior notice.
- In the event of our cancelling or postponing a course or workshop, our liability will be limited to a full refund of the course fee.
- Mercia cannot be held responsible for any personal belongings left at any course venue.
- All prices plus VAT, where applicable.

Booking is Easy…

Phone

Call a member of our enrolments team on 0116 258 1241

Online

Book online at www.mercia-group.co.uk using the following simple steps

- Click on the 'Find a Course' icon or 'login' if you are already registered
- Use the filters to narrow down your search or view all the courses available
- Select a course and click 'Book Now'

Email

Send your request to enrolments@mercia-group.co.uk

Post

Complete the relevant booking form on pages 81 – 84 and return to us by post to

Mercia Group Ltd
Best House
Grange Business Park
Enderby Road
Whetstone
Leicester
LE8 6EP

Fax

Complete the relevant booking form on pages 81 – 84 and return to us by fax on 0116 258 1250

CPD Individual Courses Booking Form

Please photocopy this form if there is not enough space.

Firm ____

Address ____

____

Tel No ______________________ Fax No ______________________

E mail ____

Contact (please print) ____

I wish to book the following courses:

Course Title	Venue	Date am/pm if applicable	No. of Places	Cost*

*Courses that cost £85 or £110 are £115 when running in Northern Ireland

Sub total	£
Plus VAT at 17.5%	£
Total (Cheque enclosed payable to Mercia Group Ltd)	£

PAYING BY CREDIT CARD
VISA, MASTERCARD OR DELTA ACCEPTED

Cardholder No ______________________

Security Code ______________________

Card Expiry Date ______________________

Cardholder Name & Initials ______________________

____

Cardholder Address (inc. Postcode) ______________________

____

☐ Please invoice my firm. I understand the usual 28 days credit terms apply

☐ I/We enclose a cheque for £ ________ made payable to Mercia Group Limited

Confirmation: An invoice will be sent as confirmation of your booking (if appropriate).

Cancellations: No refund will be made where cancellation is received less than 14 days before the date of the course. All other cancellations will be subject to a 20% administration charge. All cancellations must be in writing.

Please return to: Mercia Group Limited, Best House, Grange Business Park, Enderby Road, Whetstone, Leicester LE8 6EP

CPD Season Ticket Booking Form

Please photocopy this form if there is not enough space.

Firm ____

Address ____

____

Tel No ______________________ Fax No ______________________

E mail ____

Contact (please print) ____

I wish to book the following courses:

Course Title	Venue	Date am/pm if applicable	No. of Places

*Courses that cost £46.50 are £57.50 when running in Northern Ireland.

Total places [ ] @ £46.50* if 10 or more places booked £

Plus VAT at 17.5% £

Total (Cheque enclosed payable to Mercia Group Ltd) £

PAYING BY CREDIT CARD
VISA, MASTERCARD OR DELTA ACCEPTED

Cardholder No ______________________

Security Code ______________________

Card Expiry Date ______________________

Cardholder Name & Initials ______________________

____

Cardholder Address (inc. Postcode) ______________________

____

☐ Please invoice my firm. I understand the usual 28 days credit terms apply

☐ I/We enclose a cheque for £ [ ] made payable to Mercia Group Limited

Confirmation: An invoice will be sent as confirmation of your booking (if appropriate).

Cancellations: No refund will be made where cancellation is received less than 14 days before the date of the course. All other cancellations will be subject to a 20% administration charge. All cancellations must be in writing.

Please return to: Mercia Group Limited, Best House, Grange Business Park, Enderby Road, Whetstone, Leicester LE8 6EP

Personal, Management & Business Development Skills

Please photocopy this form if there is not enough space.

Firm ______________________________

Address ______________________________

____

____

____

____

____

Tel No ______________________________

Fax No ______________________________

E mail ______________________________

Contact (please print) ______________________________

PAYING BY CREDIT CARD
VISA, MASTERCARD OR DELTA ACCEPTED

Cardholder No ______________________________

Security Code ______________________________

Card Expiry Date ______________________________

Cardholder Name & Initials ______________________________

____

Cardholder Address (inc. Postcode) ______________________________

____

☐ Please invoice my firm. I understand the usual 28 days credit terms apply

☐ I/We enclose a cheque for £ [   ] made payable to Mercia Group Limited

Confirmation: An invoice will be sent as confirmation of your booking (if appropriate).

Cancellations: No refund will be made where cancellation is received less than 14 days before the date of the course.
All other cancellations will be subject to a 20% administration charge. All cancellations must be in writing.

I wish to book the following courses:

Course	Delegate Names	Venue
Appraising and Developing Your People @ £185 per person		
Client Care for Support Staff @ £185 per person		
Delivering Quality Client Service @ £185 per person		
Developing Personal Resilience @ £295 per person		
Effective Networking Skills @ £185 per person		
Handling Difficult Situations @ £295 per person		
Motivational Leadership and Team Development @ £295 per person		
Turning Prospects Into Clients @ £295 per person		
The People Manager's Toolkit @ £295 per person		

Total number of places	£
Total of [ ] places @ £185	£
Total of [ ] places @ £295	£
Plus VAT at 17.5%	£
Total (Cheque enclosed payable to Mercia Group Ltd)	£

Please return to: Mercia Group Limited, Best House, Grange Business Park, Enderby Road, Whetstone, Leicester LE8 6EP

Professional Development Courses Booking Form

Please photocopy this form if there is not enough space.

Firm ______________________________

Address ______________________________

____

Tel No ______________________ Fax No ______________________

E mail ______________________________

Contact (please print) ______________________________

I wish to book the following courses:

Course Title	Venue	Date am/pm if applicable	No. of Places	Cost

Sub total	£
Plus VAT at 17.5%	£
Total (Cheque enclosed payable to Mercia Group Ltd)	£

PAYING BY CREDIT CARD
VISA, MASTERCARD OR DELTA ACCEPTED

Cardholder No ______________________

Security Code ______________________

Card Expiry Date ______________________

Cardholder Name & Initials ______________________

____

Cardholder Address (inc. Postcode) ______________________

____

☐ Please invoice my firm. I understand the usual 28 days credit terms apply

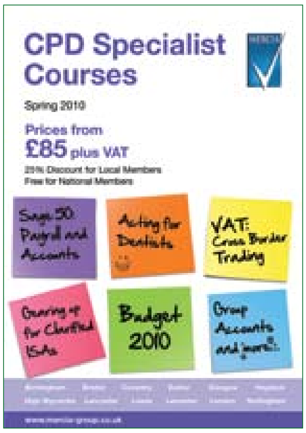
☐ I/We enclose a cheque for £ ________ made payable to Mercia Group Limited

Confirmation: An invoice will be sent as confirmation of your booking (if appropriate).

Cancellations: No refund will be made where cancellation is received less than 14 days before the date of the course. All other cancellations will be subject to a 20% administration charge. All cancellations must be in writing.

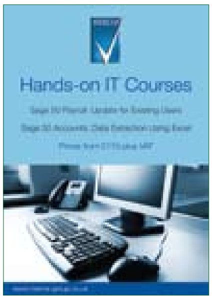
Please return to: Mercia Group Limited, Best House, Grange Business Park, Enderby Road, Whetstone, Leicester LE8 6EP

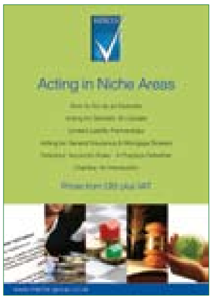
Specialist CPD Courses

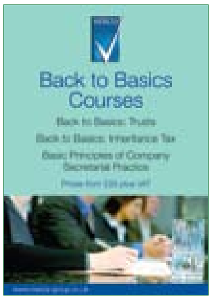


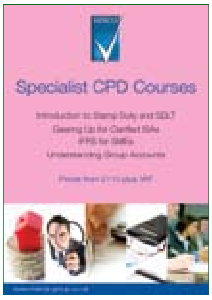
Our specialist course programmes are organised twice yearly in the spring and autumn. The programmes are planned in response to what is happening in the professional environment. There is no set pattern or regular programme as they address needs as and when they are identified.

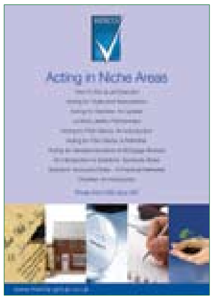
The programmes are designed to provide you with a selection of highly topical and specialist courses which will not usually be found in our local CPD course programmes. Our presenters are highly experienced and knowledgeable professionals and their delivery is always from a practical perspective. We don't just inform you about the facts but aim to interpret rules and regulations and explain how they will affect you and your clients.





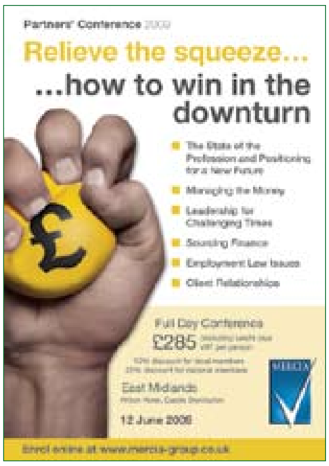


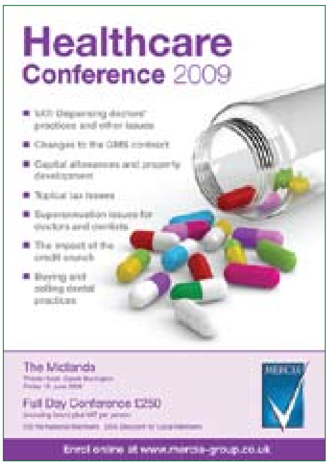


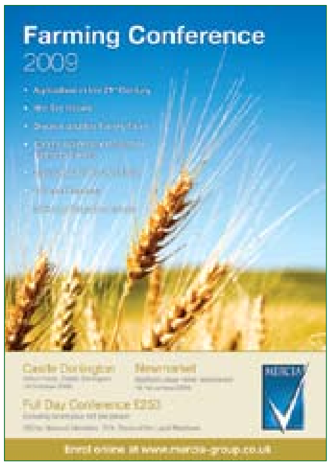


Specialist Conferences

In 2007 we introduced our specialist conferences to cover topics which are not normally included in our CPD courses. The conferences give delegates the opportunity to gain a wider appreciation of factors affecting both their own practices and clients. Going forward these are annual events looking at a wide range of practical issues which will enable you to provide the best advice for your clients.







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